

**25 years of the EUrope Logistics
International Conference of Logistics
26th March 2009-Budapest**

Global trends of transport development

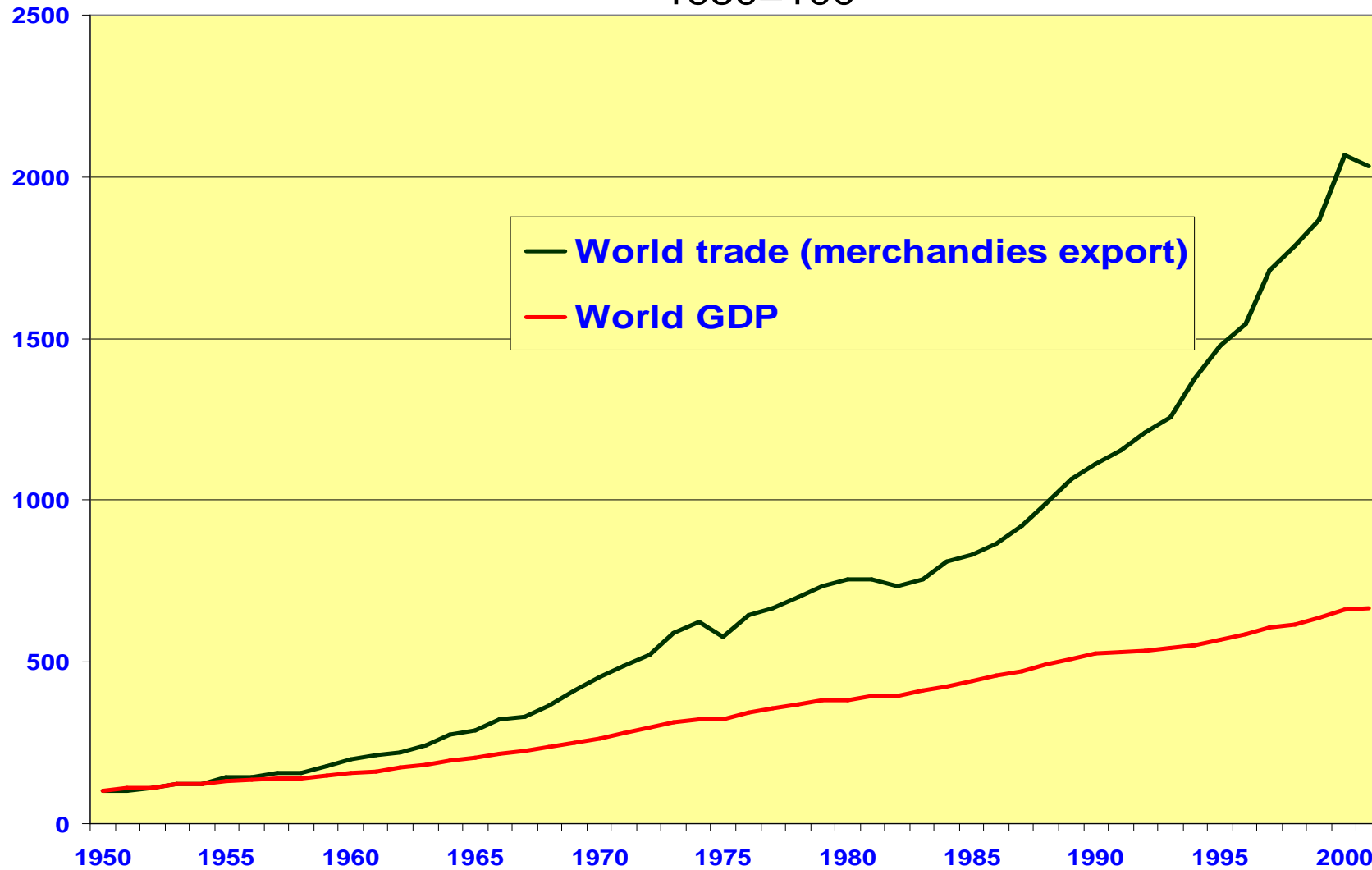
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Content

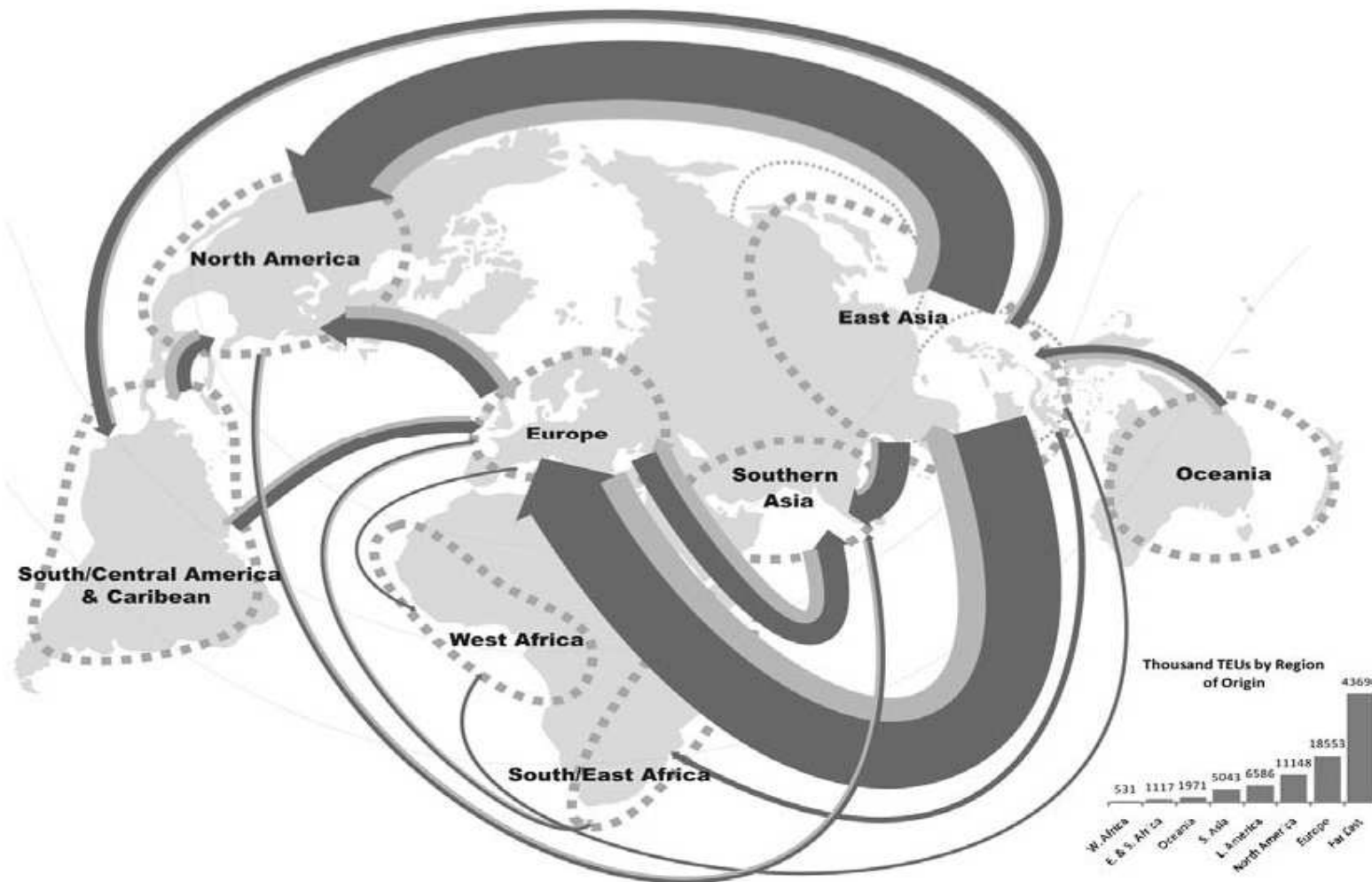
- World trade & global logistics
- Transport as a workhorse of logistics
- Transport network in Europe
- Market liberalization or protectionism
- Conclusions

World GDP & World Trade

1950=100



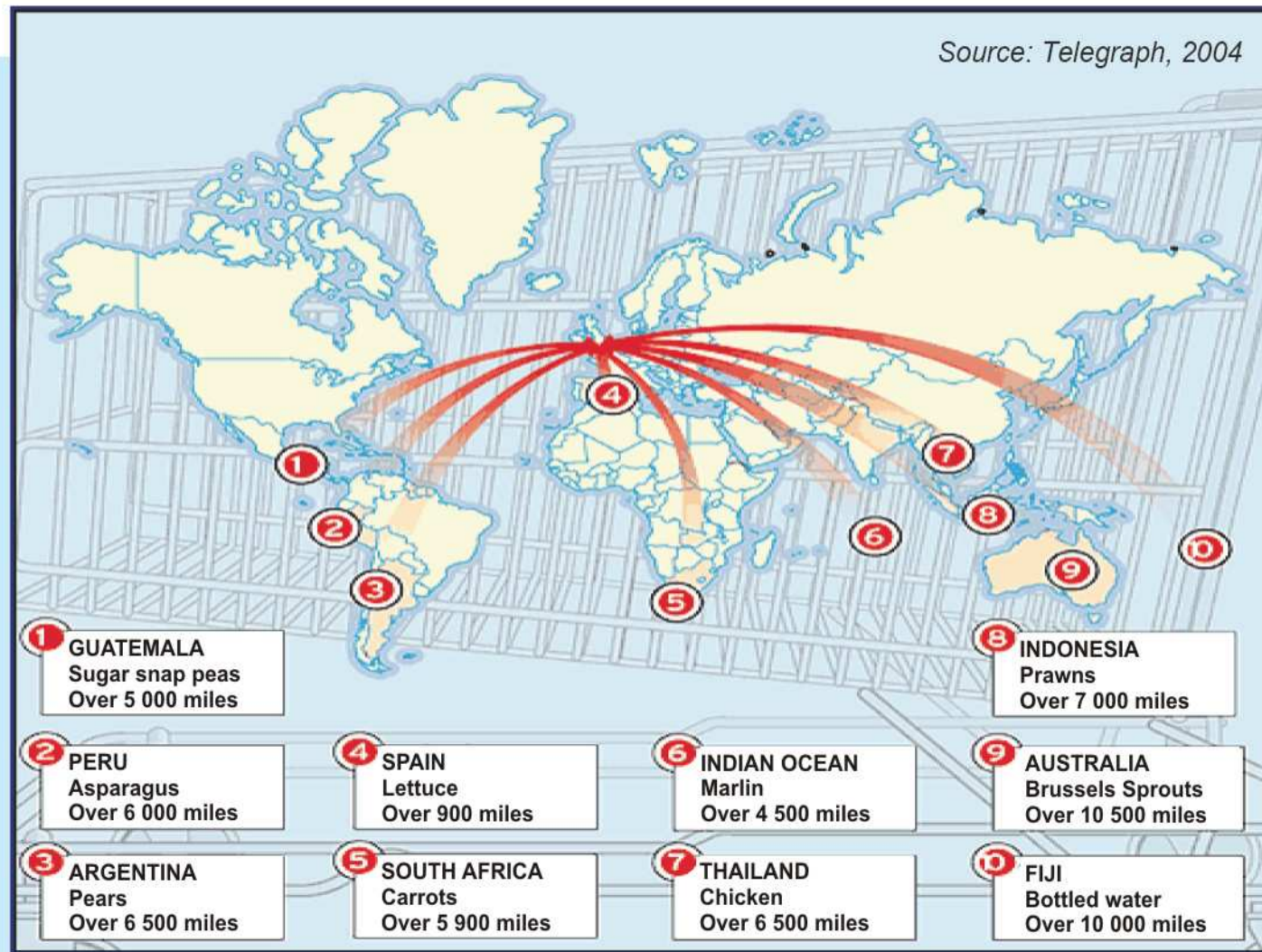
Main flows of container movements



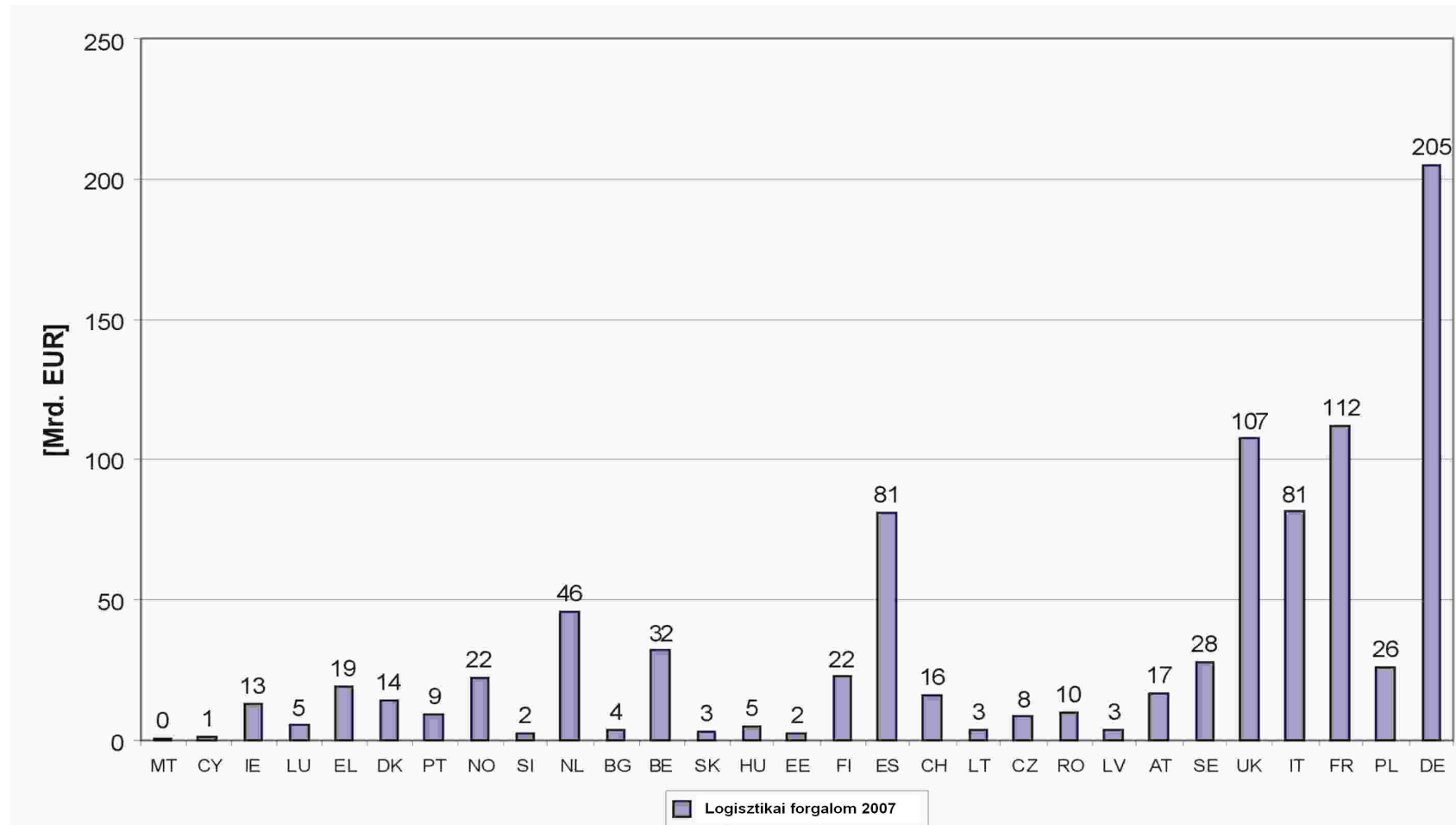
Source: OECD/ITF/JTRC

Emerging Global Logistics Networks

Challenge = world-wide reach



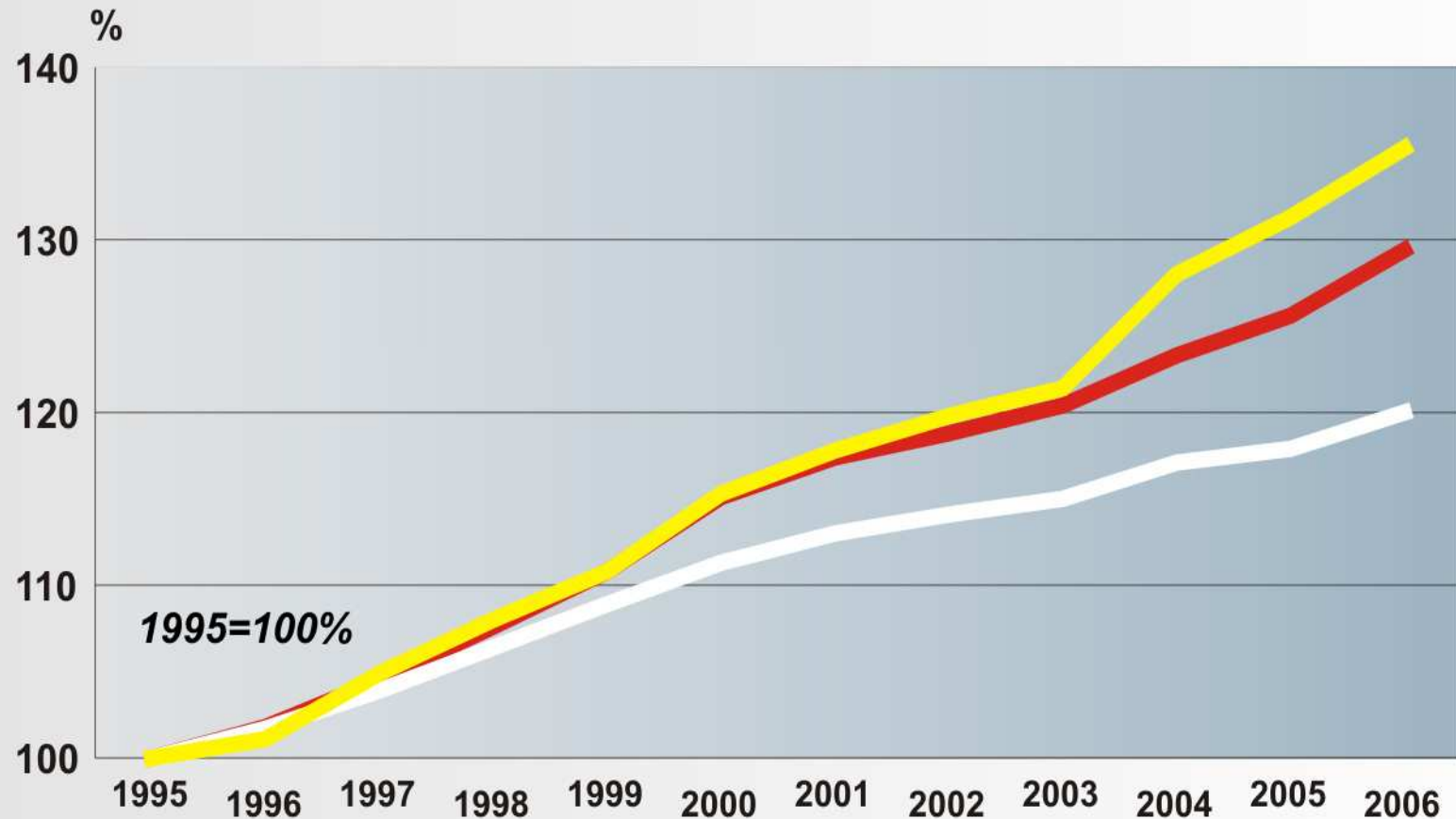
Business trade volume of logistics in several European countries (2007)



Source: Combinet

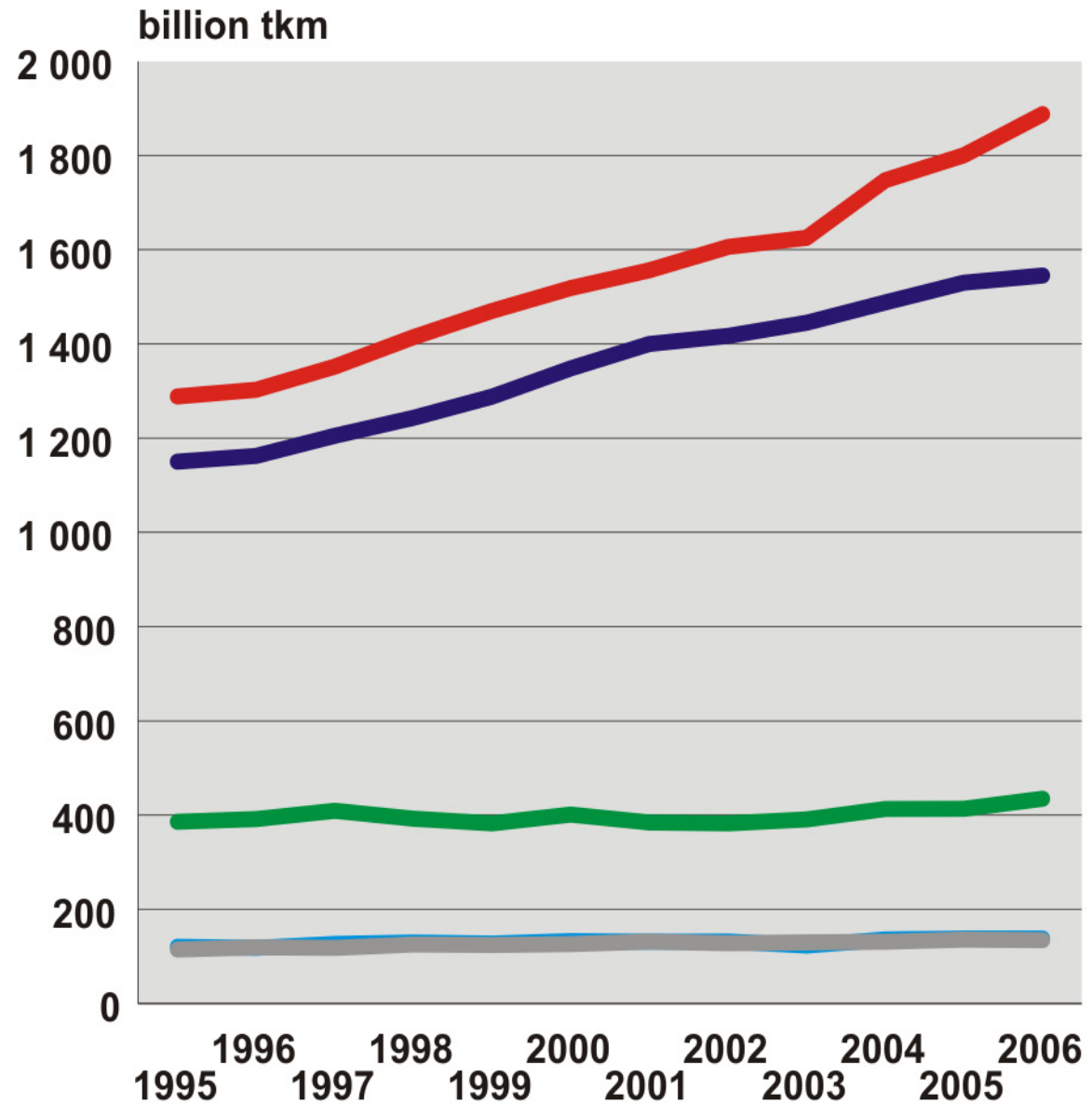
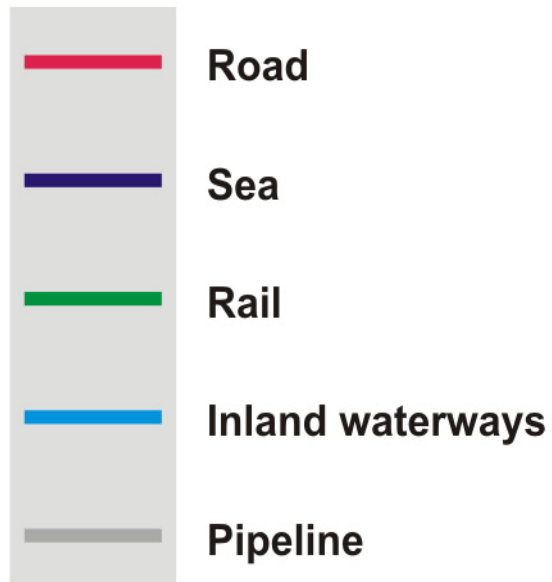
Trade volume of logistics

Goods and Passenger Transport Performances and Change of GDP in EU27

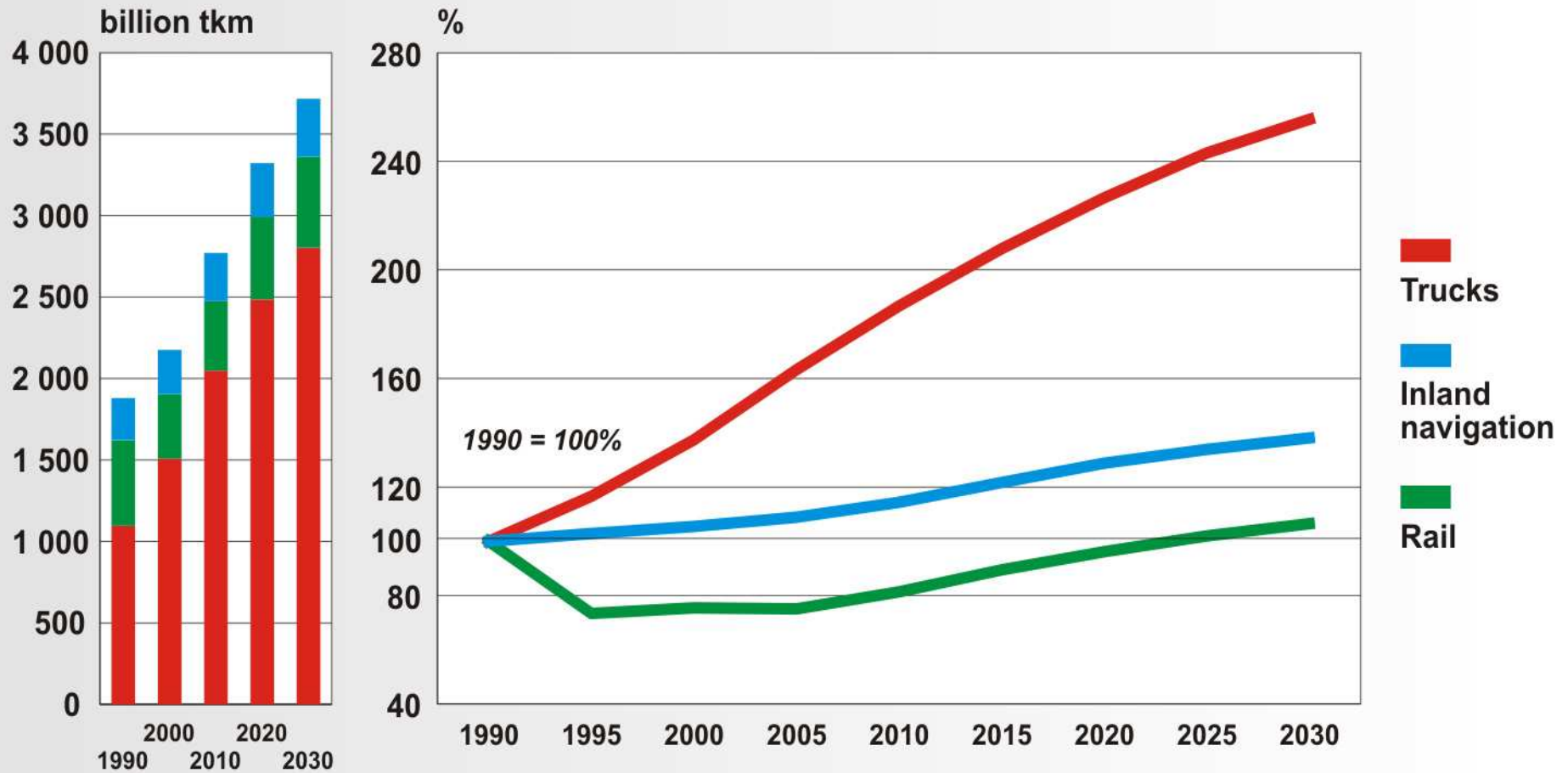


— GDP
 — Passenger transport (pkm)
 — Goods transport (tkm)

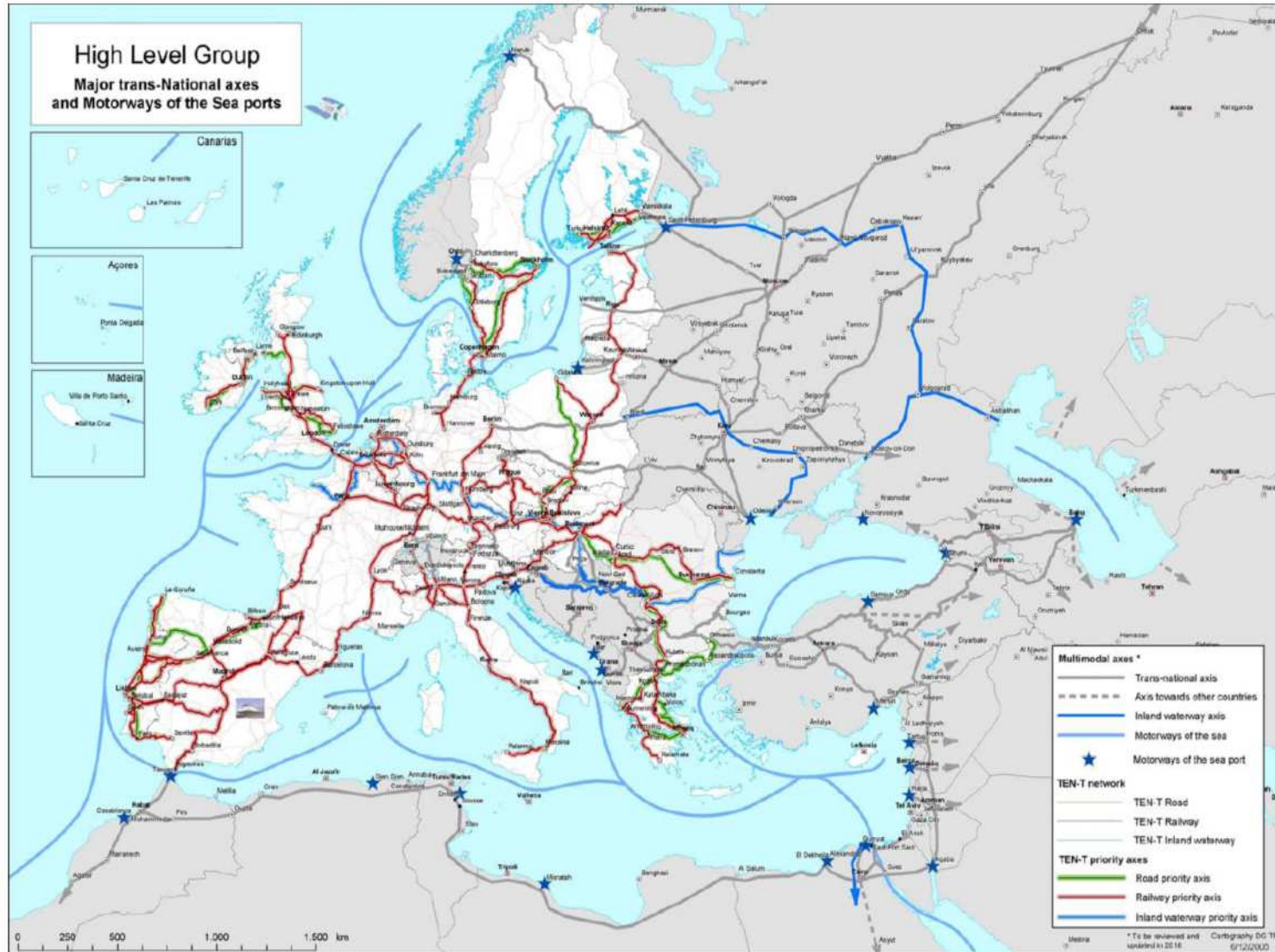
Goods Transport Performance by Transport mode EU27



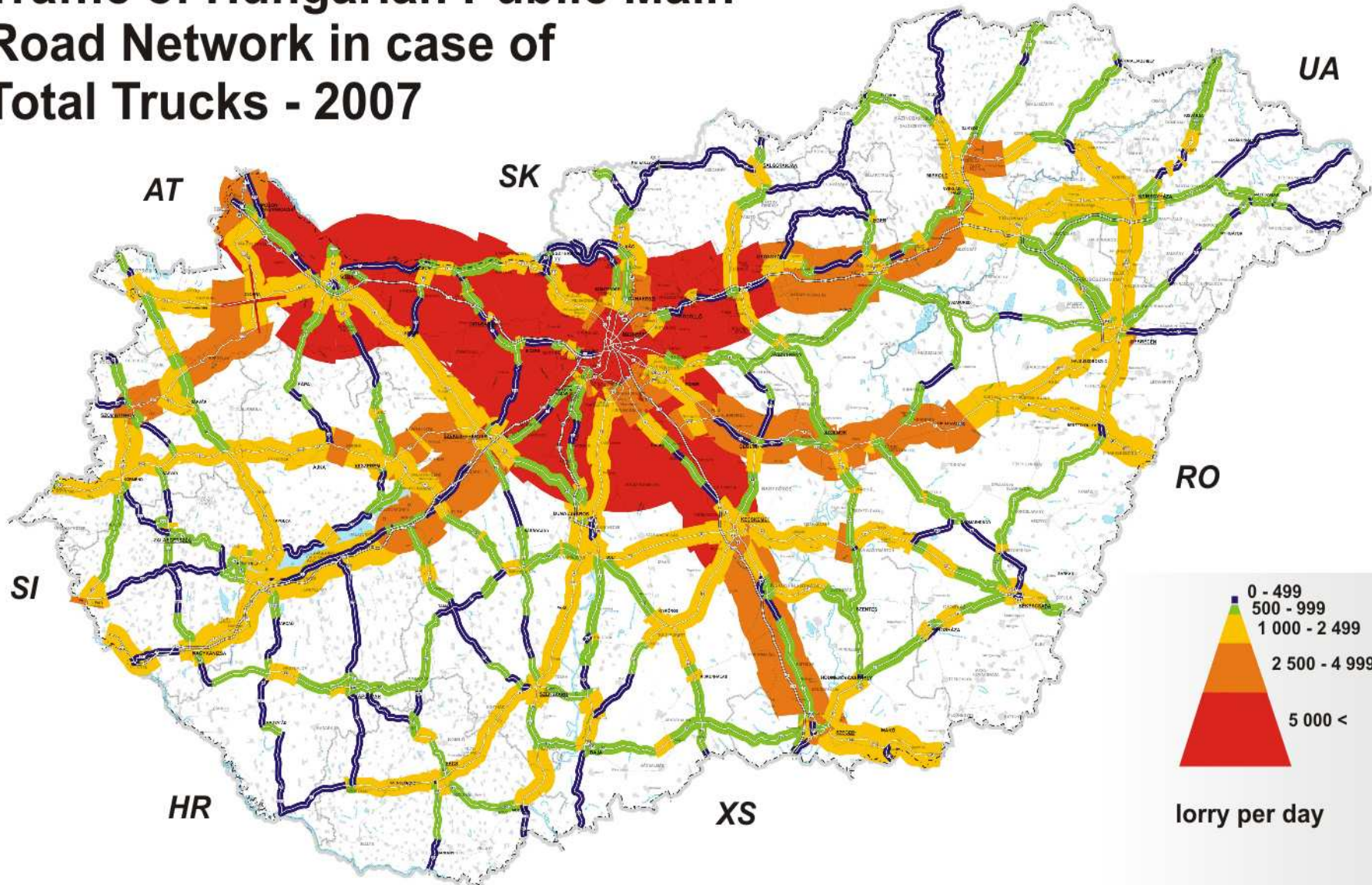
Expected Growth in Freight Transport Activity by Mode to 2030 in EU27



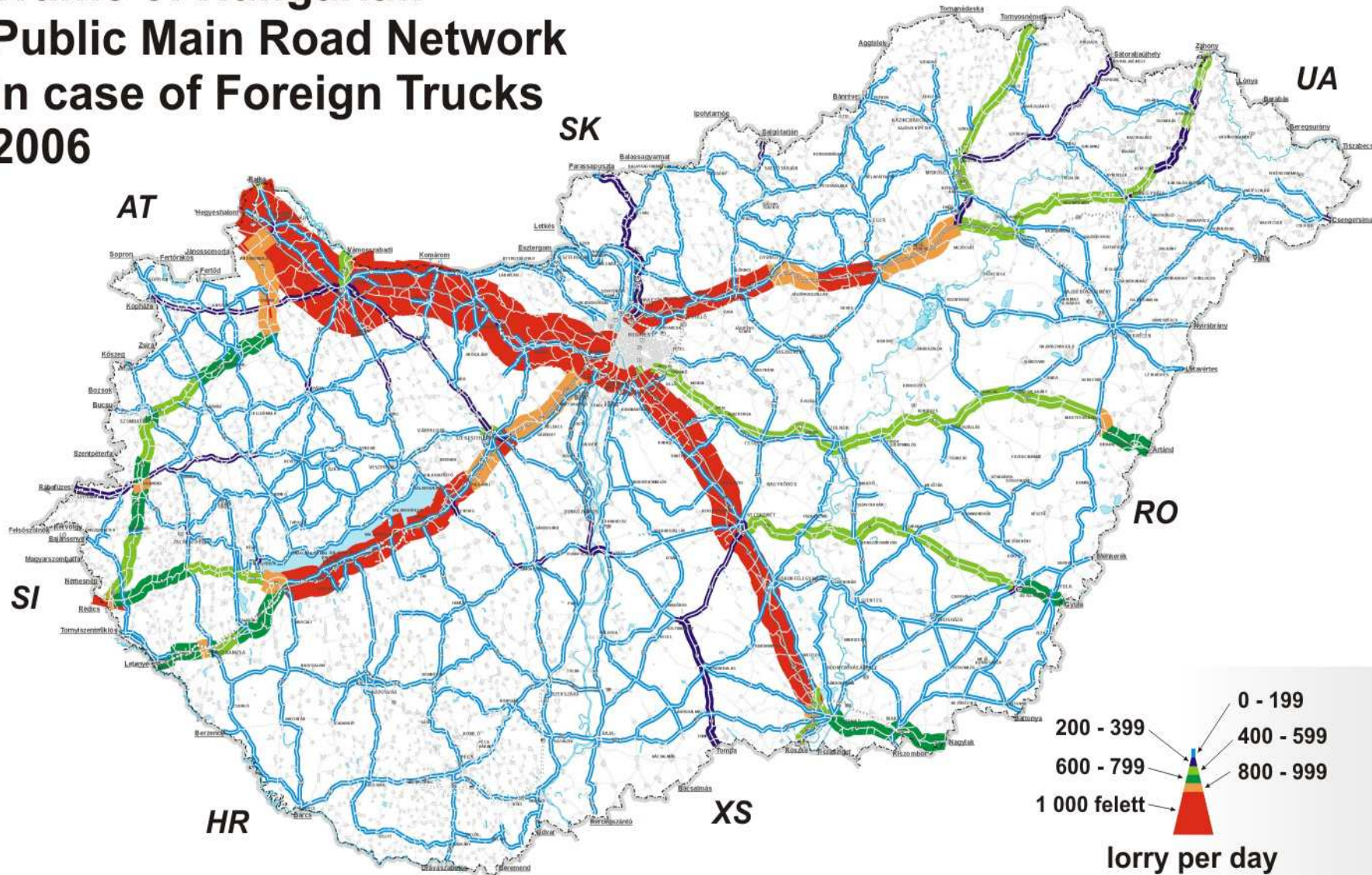
Major Trans-National Axes - TEN-T priority axes

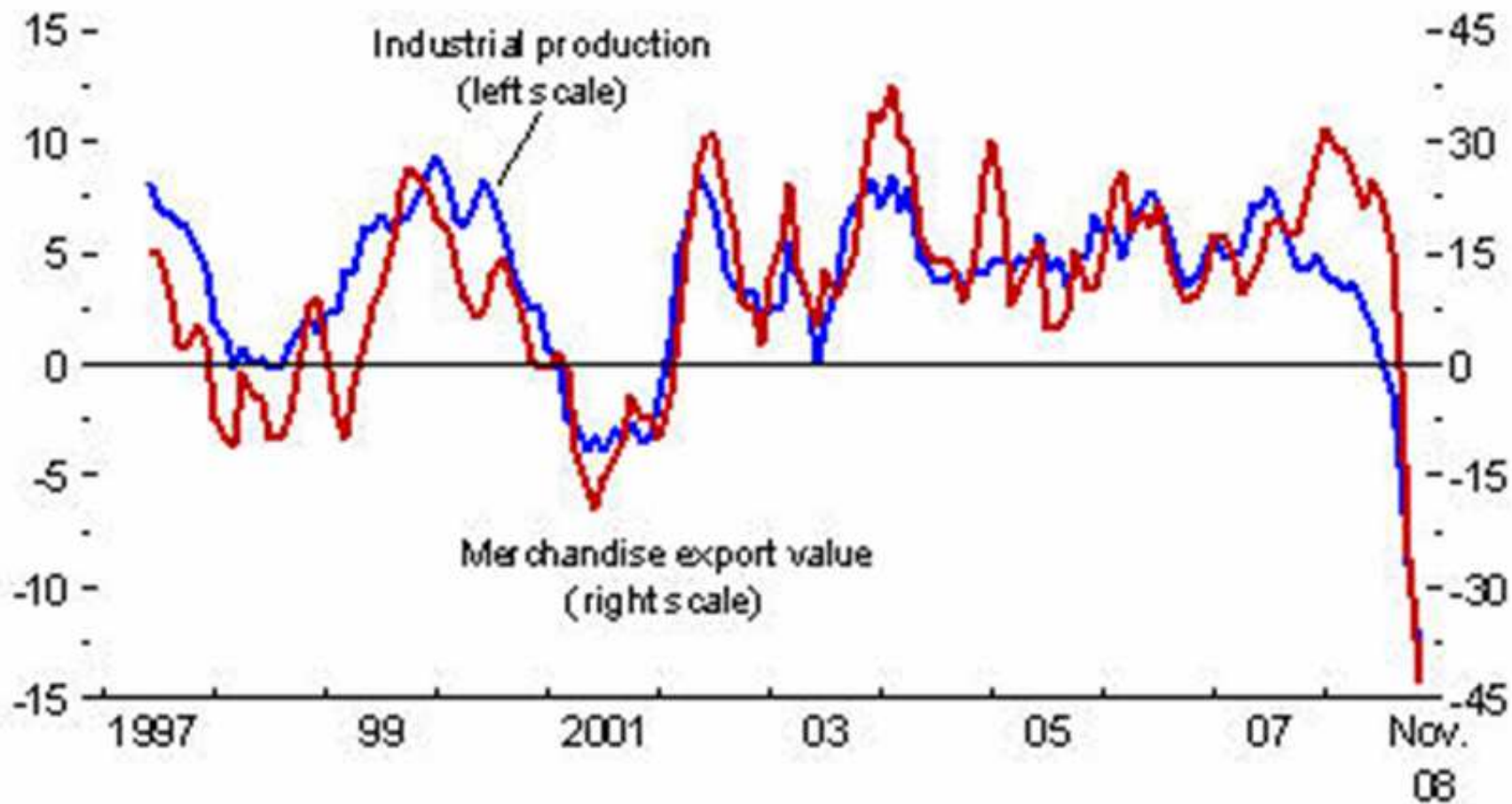


Traffic of Hungarian Public Main Road Network in case of Total Trucks - 2007



Traffic of Hungarian Public Main Road Network in case of Foreign Trucks 2006

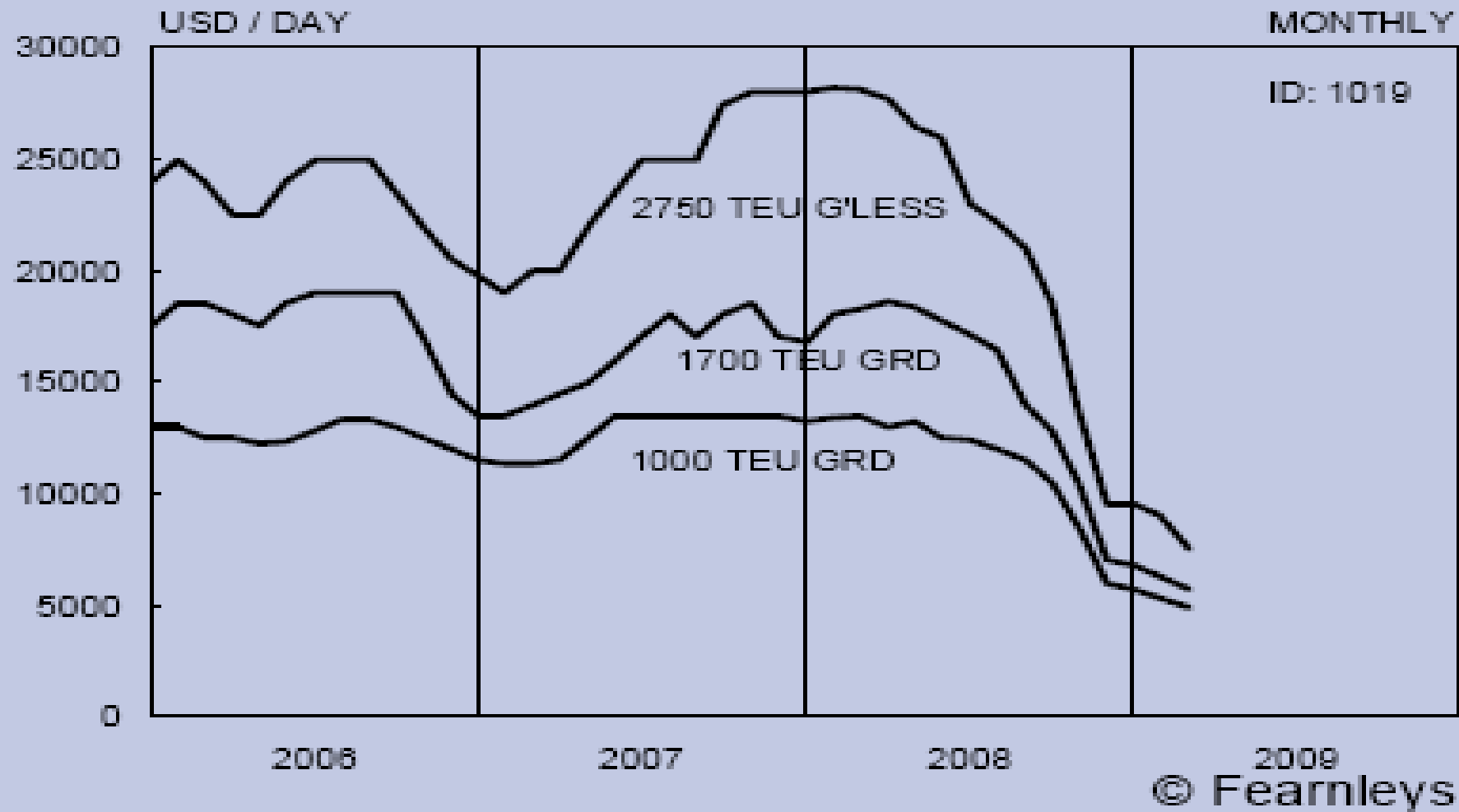




Source: EU DG TREN

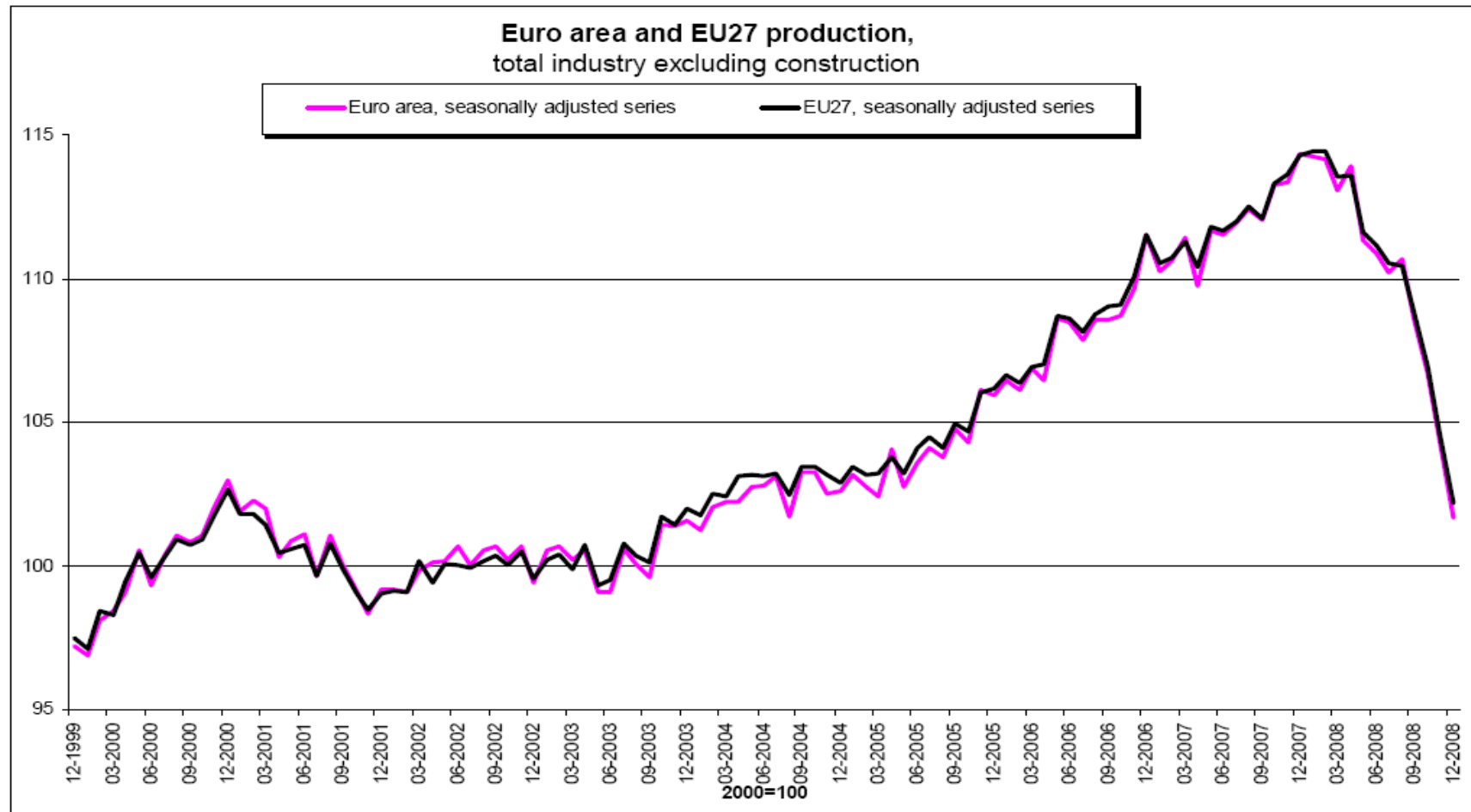
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CONTAINERSHIP TIMECHARTER RATES



Source: EU DG TREN

Total Industrial Production Excluding Construction (Euro area and EU27)



Source: EU DG TREN

Heavy Goods Vehicles Traffic*

Country	Length of motorway (km)	Date	Changing of the traffic (%)
Italy (AISCAT)	5655	2008/2007 November	-9,8
Spain (ASETA)	3378	2008/2007 December	-33,9
France (ASFA)	8500	2008/2007 December	-5
Austria (ASFINAG)	2103	2009/2008 January	-20,7
Czech Republic (Kapsch T.S.)	1180	2009/2008 January	-19,3
Hungary	911	2009/2008 January	- 15,1

Source: Motorways Authorities, KKK

Vancouver - US Routes before 1995



Source: OECD/ITF/JTRC

Vancouver – US Routes 2008



Source: OECD/ITF/JTRC

Conclusions

- Globalization is driven by efficiency in transport and its mainly based on maritime shipping
- Increasing the unit value of transported goods, the relative transport price can be low
- Some experts declare that in fact „globalization is only just starting”
- The competition – liberalization of the transport market, services – stimulate the technology, innovation and efficiency
- Market protectionism may offers just short-term benefits
- The economic crisis now urge the international effort to improve the key links in the transport chain

Thank you for your attention!

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