

**Executive
Summary**



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DVZ

TOP **100**

Martin Schwemmer

TOP 100

in European Transport
and Logistics Services



2019
2020

Editor: Alexander Pflaum

A study by
Fraunhofer Center for Applied Research
on Supply Chain Services SCS



Fraunhofer
IIS

Introduction and Acknowledgements

We are in our 25th year of TOP100 studies. Since logistics is not really tangible from official statistics this study series was designed in 1995 at Fraunhofer SCS to fill this gap. Even if logistics market assessments are carried out now this long time, our interest and curiosity about what the future will bring for logistics is undiminished. And it is more exciting than ever to analyze logistics.

The European logistics sector has reached a size of € 1,120 bn. for the total expenditure on logistics activities carried out in 2018. And even if the transported quantities flowing through the logistics systems increased only moderately the logistics sector could grow by 3.7 percent in 2018 for the whole of Europe because shipments are still increasing because ever lighter parcels flowing through the logistics networks. Even with hardly higher tonnages in the overall system, lucrative growth for logistics can result, as the supply chains extend more and more to the end customers, resulting in more filigree flows of goods that are more complex to deliver. This development now meets the reality called driver shortage and digitization. If you like to find out more about this, then this issue of TOP100 is for you.

Thus, this study is aimed at logistics service providers as well as logistics units in industry and trade, and also at shippers. The TOP100 is also aimed at suppliers of logistics, consulting, politics and business journalists.

Where the study is primarily concerned with figures, data and facts, the people who have rendered outstanding services to this issue should be the focus of attention at this point.

Many thanks go out to all the experts, companies and institutions, which supported us by providing data and assessments. Special thanks go to DVV Media Group, Hamburg, and the German Logistics Association (BVL), for their continuing support for this project as publishers.

I would like to thank the head of the Fraunhofer Center for Supply Chain Services, Prof. Alexander Pflaum, for taking over the function as editor of the TOP100 studies and for his impulses for the joint further development of this research.

My thanks also go to Prof. Peter Klaus in particular, whom I can always contact for the concerns of the TOP100, either announced or unannounced, by email, telephone or in person.

Special thanks go to the Nuremberg TOP100 team of the Fraunhofer Center for Supply Chain Services SCS, where this study is made. These are by name: Konrad Dürrbeck, Phillip Eckstein and Alexander Hempfing, and also Sophia Bachmann, Dominik Landau, Bennet Niederhöfer, Sarah Pörschmann and Markus Riks.

I thank Karl-Heinz Westerholt for the implementation of the layout.

Further thanks go to our supporters AEB, Commerzbank, KPMG, Transporeon and ICC.

In the hope that I have thought of everyone, I wish you, dear readers, interesting reading. Let me know what you like about the study – but also what you don't like. We will be happy to take up your suggestions for future issues.

Nuremberg, October 2019



A handwritten signature in black ink, appearing to read 'M. Schwemmer', written in a cursive style.

Martin Schwemmer

Statements of Partners



Steffen Frey

Member of the Board of Directors
AEB SE

Dear Reader,

International trade promotes prosperity and peace. An essential prerequisite for this is functioning logistics with smooth flows of goods that are not obstructed by national borders. Making this happen has been our driving force at AEB for over 40 years: We are striving to develop software solutions that increase efficiency in supply chain processes and make them more ecological, safer, and fairer. Software that, for example, helps to comply with compliance and embargo regulations. That allows to automate customs formalities and handle them faster. That improves cooperation between shippers and logistics companies. The TOP100 reference work pursues the same goal by bringing transparency to the supplier market. We are therefore pleased to contribute to TOP100 and to support the publication as a sponsor.

*Yours sincerely,
Steffen Frey*



Jens Wagener

Director / Sector Coordinator Transport & Logistics
Capital Markets
Commerzbank AG

Dear Reader,

The European logistics industry is one of Commerzbank's leading focus sectors. The high level of sector expertise within our organization is the result of regular and close exchange with our customers on-site, trade associations and public authorities, as well as of our annual industry symposiums.

Since the TOP 100 study was first published many years ago, we have come to appreciate this unique and comprehensive compendium of one of the most complex industries, which continues to provide a reliable survey of the most important trends affecting the global industry. Therefore, this study is a "must-have" for all market players and interested parties such as transport and logistics companies, research institutes, consulting firms and financial investors. We as Commerzbank feel privileged to lend our support to this new edition of the European TOP 100 study.

We hope you will enjoy reading the study and come to regard it as a valuable source of inspiration and ideas on how to further develop and strengthen your business.

*Yours sincerely,
Jens Wagener*

AEB

COMMERZBANK 



Dr. Steffen Wagner

Global Chair Transport & Leisure
KPMG AG

Dear Reader,

Having observed the Transport and Logistics Industry for several years now, it is inspiring to see the overall market more vivid and alive than ever. Despite geopolitical tensions, technological disruption and macroeconomic uncertainties, the industry remains fundamentally strong, because at the very heart of its business model, it connects goods and people all over the world, and therefore is and will remain the backbone of global trade. As we move forward into an age where transport and mobility become increasingly connected, where digital processes enable integration and collaboration on a new scale between global partners, we are privileged to support the TOP100 in its endeavor to provide structure and transparency for a highly complex market.

*Yours sincerely,
Steffen Wagner*



Marc-Oliver Simon

CEO & Founder
Transporeon

Dear Reader,

The Transport logistics sector reacts more sensitively than almost any other to structural and economic changes, as it is closely linked to developments in the manufacturing sector. Economic crisis lead to severe fluctuations in transport demand and prices and challenges industrial corporations and trading companies as well as their transport service providers in their strategic planning. This is one more reason why these companies see the further development of the digital supply chain as an opportunity in order to react quickly and flexibly to sometimes unpredictable economic developments. Our close cooperation with our shipping customers and carriers shows us the open-minded approach with which all parties are facing the digital change. We are pleased to be able to pass on our insights, which are based on extensive analyses of our platform data as well as regular surveys and discussions with our customers, as part of the TOP100 logistics framework.

*Yours sincerely,
Marc-Oliver Simon*



Contents

PART I	In a time of increasing concern, the world still seems to be in order – Management summary and trend discussion	1
I.1	Logistics megatrends review 2020+	2
I.2	Recent operational challenges and future trends	6
I.3	Lack of skilled labor leads to tight capacities.	6
I.4	High level topic digitalization implies investments above 2 percent of turnover.	7
I.5	Start-ups pave the way to »New logistics«	9
I.6	Logistics and politics – not yet a team.	12
I.7	Feature by KPMG- Global M&A environment in Transport & Logistics	17
I.8	Feature by Transporeon - 2019 European Road Transportation Survey. .	20
I.9	Feature by Commerzbank - Going the extra mile supported by CommerzFactoring	23
I.10	Feature by AEB SE - New Tools for New Work	25
PART II	Demarcation of the logistics market – the subject of the »TOP 100« survey	29
II.1	»What« – Definition of logistics and the demarcation of logistics markets	29
II.2	»Where« – Geographical boundaries of the survey.	30
II.3	»When« – Time period and data considered	31
PART III	Measuring the total cost of the European business logistics system	33
III.1	The measurement of the expenditure of the total logistics sector in Europe for 2018 results in a volume of € 1,120 bn.	33
III.2	How to calculate the logistics volume of the »Europe of 30«	35
III.3	Logistics expenses forecast for Europe and selected countries.	50
III.4	A further differentiation: the sizes of the nine logistics segments in Europe	52
PART IV	Profiles of nine logistics segments under observation.	55
IV.1	Bulk Logistics	59
IV.2	General Truckload/Full Carload (FTL).	65
IV.3	Groupage and general Less-than-Truckload (LTL)	71
IV.4	Specialized Transportation	78
IV.5	CEP – Courier, Express and Parcel Services	84
IV.6	Contract Logistics	91
IV.7	General Warehousing and Terminal Operations	99
IV.8	Ocean Cargo.	104
IV.9	Air Freight.	109
PART V	The »TOP 100«	113
Appendix 1	The ABC of company profiles of the European »TOP 100«	121
Appendix 2	Terms, data bases, survey methods and limits of predictability .	323
Appendix 3	Questionnaire	331
Appendix 4	References of »TOP 100« studies	337

In a time of increasing concern, the world still seems to be in order

With a growth of 3.7 percent, the European logistics sector recorded stronger growth in 2018 than was to be expected in the previous year. This results in a logistics sector volume of 1.120 billion, of which 50 percent is provided by logistics service providers. The remaining 50 percent are provided within the framework of plant logistics by industry and trading companies. The volume generated for transport alone amounts to around € 513 billion (46 percent), and around € 361 billion (32 percent) are incurred at the logistics locations in the area of warehousing and transshipment. A share of 7 percent and thus around € 78 billion is attributable to logistics planning and around € 168 billion (15 percent) represent inventory holding costs.

Around 19 billion tons were moved through the logistics sector in Europe, which can be translated into a figure of around 37 tons per capita of the population. As in former years, the CEP market segment shows the highest growth rate, while contract logistics and warehousing/terminal segments grew by average from 2016 until 2018. Bulk transportation and Ocean cargo did hardly grow, whereas FTL, LTL and Special Transports could grow above average through adjusted freight rates mainly due to lacking loading capacity in these markets. Air Freight tonnage increased by about 10 percent from 2016 until 2018, leading to a grown air cargo market.

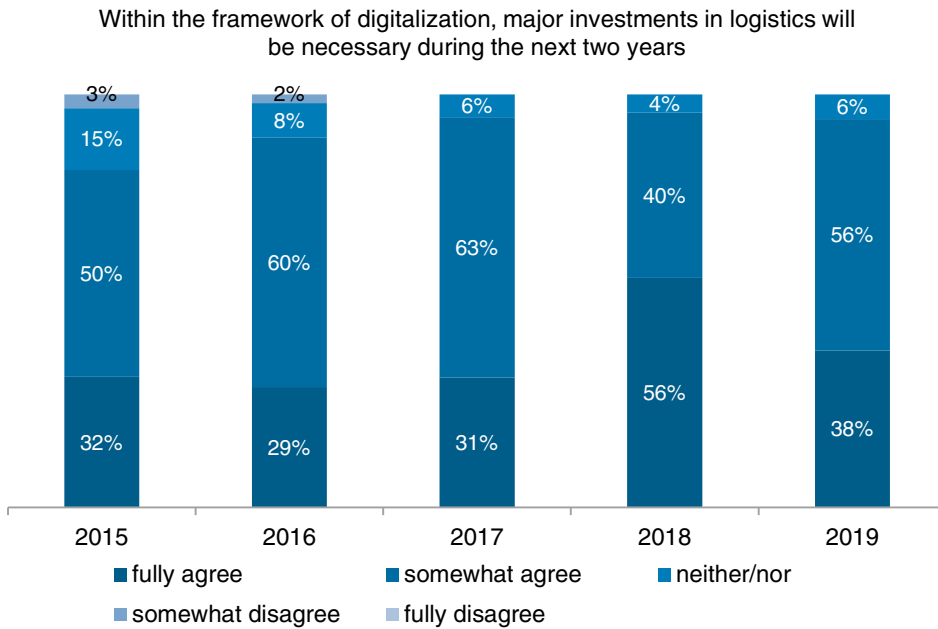
The strong influence of world trade on logistics is undisputed. Uncertainty for logistics managers emerges from threatening trade impediments. In addition to that, the discussion on sustainability improvements on a political level is source of uncertainty which regulations will come up in that field. Regarding e-mobility, economic solutions that enable for a substantial shift of goods flows away from diesel propulsion are not yet in place.

The presentation of the results in this issue is as follows: first of all a detailed trend discussion follows. Subsequent chapters address definitions for our research and the methodological approach of our work. The study also includes detailed profiles of 9 logistics market segments and the TOP100 ranking with the largest logistics service providers in Europe.



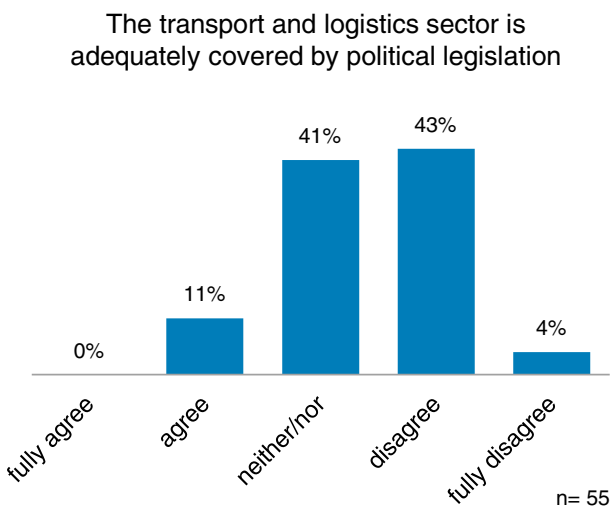
	Trend titles	Implications
1	Globalization Volatility in goods flows	<p>External trends (1 to 6) mostly affect the demand for logistics activity and services and can only be hardly influenced by single businesses.</p> <p>Implications: Trends should be observed to react properly in regard to own operations.</p> <p>Trends 7 to 10 can be tagged as internal trends, which are possible to be influenced by logistics deciders.</p> <p>An incremental and ongoing business transformation process can explicitly be directed towards lifting potentials from those trends and developments (e.g. technology deployment, professionalization etc.)</p> <p>Implications: Companies should shape those trends against the backdrop of their business.</p>
2	Demographic change Aging societies, immigration and urbanization	
3	New lifestyles High demand for convenience in business and consumer markets	
4	Servitization	
5	Sustainability	
6	Rising risks and threats Political and economic instability, climate change, natural catastrophes, terrorism and cybercrimes	
7	Innovative technologies and digital transformation	
8	New challengers Innovative approaches from outside	
9	Professionalization and effective logistics Efficiency of logistic operations	
10	Shareholder value objectives in logistics Effectiveness of logistics operations	

Starting in 2015, a survey among the top logistics service providers which are addressed by the TOP100 data query each year was initiated. The following Figure 2 shows the rating of the top logistics service providers in Europe over the years regarding the hypothesis that digitalization makes investments necessary in the short term.



To react on trends, companies must spend some kind of resource (time, investments). Yet, when resources get allocated, actions and measurable outcome will follow. To concretize on an amount of investments which get allocated on digitalization topic the share of turnover which gets invested was surveyed.

Political influence is discussed frequently nowadays in regard to logistics development. Consequently the question arises, if logistics providers perceive the transport and logistics sector to be adequately covered by political legislation.

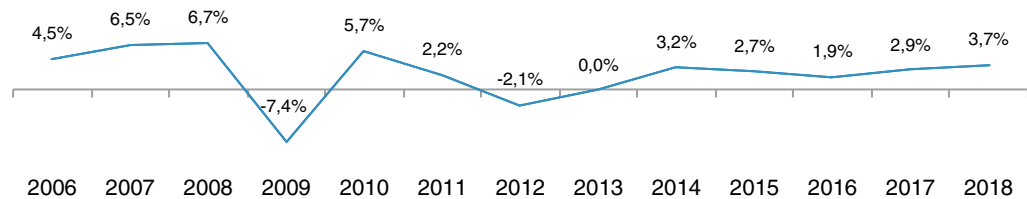


Logistics providers majority view shows disagreement to the above statement. It is a question unanswered, how this issue could be tackled in the short term.

Measuring the European business logistics system and forecast until 2024

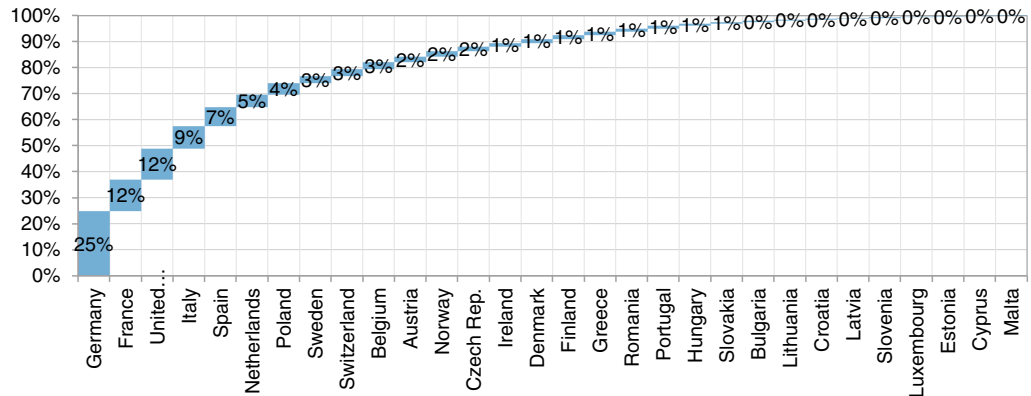
The European transport and logistics sector has grown in 2018. A growth of about 3.7 percent prolongs a trend of now three years of increasing growth development. This seems to contradict economic expectations, but, in fact is highly plausible against the backdrop of the developments of the logistics sector until the end of 2018.

Logistics volume EU30 – development since 2005



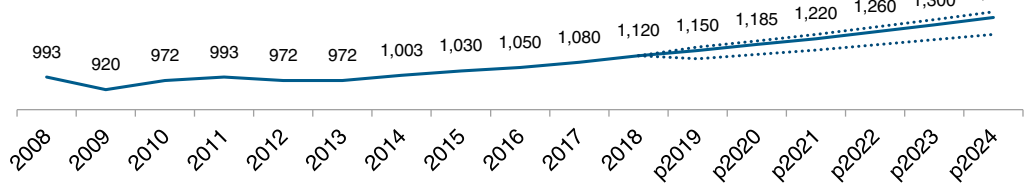
In the year 2014 for the first time the overall transaction volume of logistics increased above € 1,000 bn. and from then on rose steadily to the most recent figure.

Accumulated European logistics expenditures 2018



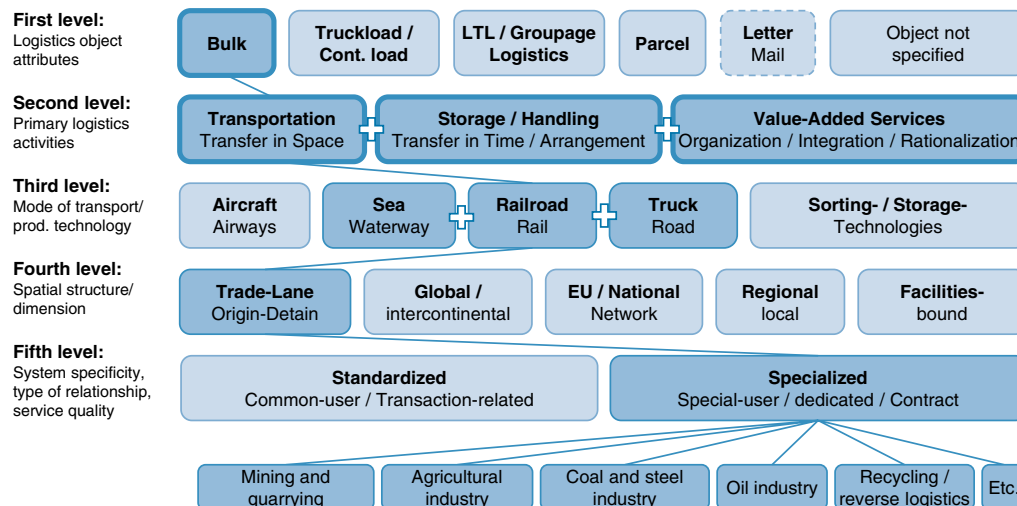
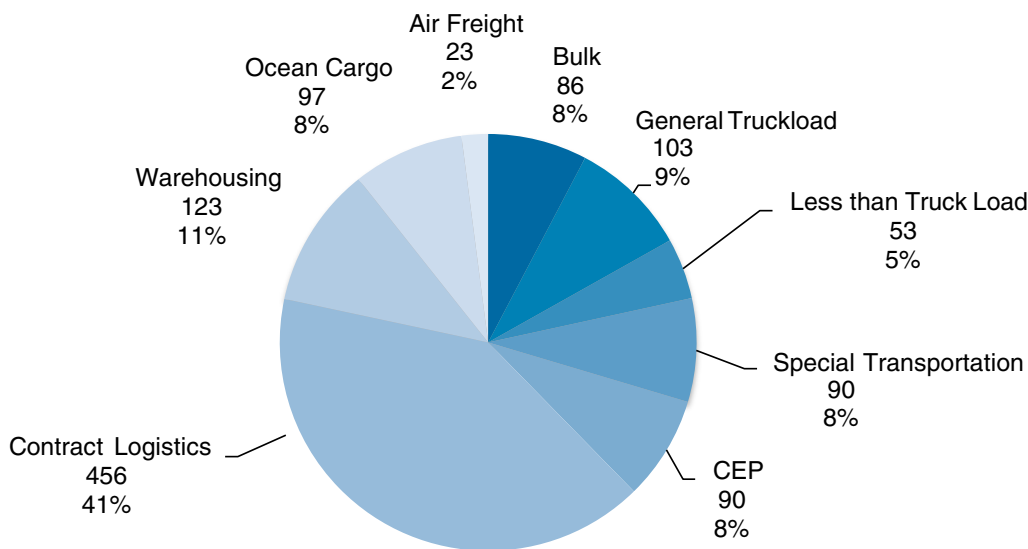
The forecast results for the whole of Europe (EU30) are displayed in the following chart. Furthermore, forecasts for Germany, France, the United Kingdom, Italy, Spain, the Netherlands, Poland and Switzerland are presented in the report.

Logistics volume EU30 in bn. € – forecast



Profiles of nine logistics segments under observation

Derived from the estimation of the whole logistics sector in Europe, a differentiation regarding the logistics segments is possible. The following figure gives the results of this differentiation in Euro:



Example for market segment structure – Bulk logistics

Boldly framed: Level of detail of the market segment is available in the recent »Top 100« study.
Slightly framed: Option of further segmentation.

The TOP 100

Rank	Company	Data Quality	Logistics Revenue Worldwide	Logistics Revenue Europe	Employees	Bulk Logistics revenue 2019 in m. €
1	2	3	4	5	6	7
1	Deutsche Post DHL (Group) (DE)	**	51,841	28,475	547,459	
2	Maersk A/S (DK)	**	34,085	17,050	80,220	
3	Deutsche Bahn AG (DE)	**	21,400	16,160	331,600	1,000
	<i>DB Schenker (part of DB AG) (DE)</i>	**	16,973	11,700	70,000	
4	Kuehne + Nagel International AG (Konzern) (CH)	***	18,435	10,972	77,416	
5	CMA-CGM SA (FR)	**	19,895	9,950	37,092	
6	SNCF SA (FR)	**	9,935	9,935	50,000	1,000
7	La Poste (Group) (FR)	**	9,665	9,665	140,000	
8	Mediterranean Shipping Company Holding SA (MSC) (CH)	*	19,550	9,500	47,000	
9	UPS Europe NV (BE)	*	62,775	7,850	481,000	
10	DSV A/S (DK)	***	10,606	7,832	47,394	
	Sum Top 10		258,187	127,389	1,839,181	3,000
11	The Royal Mail Holdings Plc. (Konzern) (UK)	*	7,500	7,500	145,000	
	<i>GeoPost SA (part of La Poste) (FR)</i>	***	7,303	7,303	33,000	
12	FedEx Express International B.V. (NL)	*	58,400	7,100	450,000	
13	Dachser SE (DE)	***	6,493	5,893	30,609	
14	XPO Logistics Inc. (US)	**	15,094	5,760	100,000	
15	Hapag-Lloyd Aktiengesellschaft (DE)	*	11,515	5,760	12,765	
16	Bolloré Holding SA (FR)	**	8,706	4,888	35,503	
...	<i>Alpen Express & Co. KG (DE)</i>	***	8,100	4,888	28,000	1,000
100						

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The TOP100 logistics service providers

The annex of the report contains 146 company profiles of the largest logistics service providers in Europe.

Gruppo → Arcese S.p.A. (IT)

Address Gruppo Arcese S.p.A.
Via Aldo Moro 95
38062 Arco

Phone +39 (0) 4
Fax +39 (0) 4
Internet www.arcese.it

Institutional Information

Board of management Eleuterio
Ownership Family-owned
Subsidiaries Arcese Ir
Polska Sp
AB, 100%
(GB); Ver
(Shanghai)
Investments Ventana S
Chile S.A
Vernöge
Joint ventures Sistema F
(cargo tra

Key Data

Logistics revenue, geographical (in million €)

World (incl. Europe)	
Europe (incl. Italy)	

Logistics Revenue by market segments (in million €)

General Truckload (FTL)	
Groupage / Less than Truckload (LTL)	
Contract Logistics	
Warehousing and Terminal Operations	
Ocean Cargo	
Air Freight	

Staff

Performance Data

Fleet / Equipment

Profile

History
Arcese supplies road transport services since combined transports. The organization is structured associated Ventana Serra, it is listed among the
Locations
Arcese is present with 35 sites in Europe including Turkey Mexico, Chile, Brazil and China. Via its Lithuania, Macedonia, Portugal, Serbia, Switzer covered.
Customer Segments
The company generates the largest share of it Motors. Further important branches are the tea consumer goods (e.g. Gilette, Heineken, IKA)
Core Competencies
Arcese offers services in the fields of road and logistic services. The subsidiary SEL is dedicated
Current Developments
In the first half of 2018 Arcese and Renault were car manufacturer for storing and sequencing a location for Arcese France.
References: Fraunhofer SCS Research (*)

KG → Bursped Spedition GmbH (DE)

Address KG Bursped Spedition GmbH
Häikestraße 63
22113 Hamburg

Phone +49 (0) 41
Fax +49 (0) 41
Internet www.bursped.de

Institutional Information

Board of management Stefan Se
Ownership Family-owned
Subsidiaries Bursped I
Vertriebs
Investments Along with
Wurfl, st

Cooperations Sharehold

Key Data

Logistics revenue, geographical (in million €)

Europe (incl. Germany)	
Germany	

Logistics Revenue by market segments (in million €)

General Truckload (FTL)	
Groupage / Less than Truckload (LTL)	
Contract Logistics	
Warehousing and Terminal Operations	
Ocean Cargo	
Air Freight	

Staff

Performance Data

Fleet / Equipment

Profile

History
Bursped was founded in 1948 by Günther Brä
Locations
The company primarily offers services in the forwarding, automobile logistics and contract l
Customer Segments
The main customer groups consist of international significant sea transport element. DFDS's customer food retailers and producers of temperature-sensitive
Core Competencies
DFDS provides sea and land transport services combined (freight & passenger) routes. The re
Current Developments
In June and October 2017, DFDS bought two instead of the previous four ships are required contracted to provide additional freight ferry company, U.N. Ro-Ro, enabled the expansion
References: Fraunhofer SCS Research (**)

DFDS Group A/S (DK)

Address DFDS Group A/S
Sundkrogsgade 11
2100 Copenhagen

Phone +45 (0) 3
Fax +45 (0) 3
Internet www.dfds.com

Institutional Information

Board of management Torben C
Ownership Lauritzen
registeret
Subsidiaries 100% sub
Latvia, Lit
the name
Investments Limited LI
Ltd., 96%
Shipping
New Cita
Juru Laiti
Joint ventures DFDS Su
Sweden).

Key Data

Logistics revenue, geographical (in million €)

World (incl. Europe)	
Europe (incl. Denmark)	

Logistics Revenue by market segments (in million €)

General Truckload (FTL)	
Groupage / Less than Truckload (LTL)	
Special Transportation	
Contract Logistics	
Warehousing and Terminal Operations	

Staff

Performance Data

Profile

History
DFDS (Det forenede Dampskibs-Selekab) is a the three biggest Danish steamship companies land-based haulage and logistics activities. To
Locations
DFDS operates several logistics and operation Norway, Scotland, Sweden, the Netherlands a
Customer Segments
The main customer groups consist of international significant sea transport element. DFDS's customer food retailers and producers of temperature-sensitive
Core Competencies
DFDS provides sea and land transport services combined (freight & passenger) routes. The re
Current Developments
In June and October 2017, DFDS bought two instead of the previous four ships are required contracted to provide additional freight ferry company, U.N. Ro-Ro, enabled the expansion
References: Fraunhofer SCS Research (**)

Hermes Europe GmbH (DE)

Address Hermes Europe GmbH
Essener Straße 89
22419 Hamburg / Germany

Phone +49 (0) 40 - 53 7 55 - 0
Fax +49 (0) 40 - 53 7 54 - 970
Internet www.hermesworld.com

Institutional Information

Board of management Carole Walker (CEO), Marc Dessing (Managing Director), Stephan Schiller (Managing Director), Hendrik Schneider (CFO), Kay Schiebur (Otto Group Executive Board Services and Chairman Supervisory Board of Hermes Europe).

Ownership OTTO (GmbH & Co KG), 100% (DE).

Subsidiaries Hermes Germany, 100% (DE), Hermes Fulfillment, 100% (DE), Hermes Einrichtungs Service, 100% (DE), Hermes International, 100% (DE), Hermes NexTec, 100% (DE), BorderGuru, 100% (DE), Hermes Hansecontrol, 100% (DE), Hermes-OTTO International, 100% (DE), Hermes Logistik Österreich, 100% (AT), Hermes UK, 100% (UK), Hermes France Holding SAS, 100% (FRA), Mondial Relay, 100% (FRA), Girard Agedies, 100% (FRA), Hermes Italia, 100% (IT), Hermes Russia, 100% (RU).

Investments Liefery (since 03/2017 majority shareholding, before 28.5%) (DE).

Joint ventures ParcelLock GmbH, together with DPD.

Cooperations Citypost S.p.A., Italien (IT).

Key Data

Logistics revenue, geographical (in million €)

	2016	2017	2018
Europe (incl. Germany)	2,640	3,130	3,200
Germany	1,800	1,850	1,850 estimated

Logistics Revenue by market segments (in million €) - Europe

General Truckload (FTL)	300	breakdown estimated
Courier, Express, Parcels (CEP)	2,500	
Contract Logistics	400	

Group revenue incl. non-logistics revenue (in million €)

	13,446
--	--------

Staff

	15,500	Europe
--	--------	--------

Performance Data

	817.00	Million shipments Europe
--	--------	--------------------------

Profile

History
Hermes Europe is Germany's largest post-independent logistics service provider for delivery to private individuals (B2C and C2C sector). Hermes is a wholly-owned subsidiary of the Hamburg-based Otto Group, which unites a total of 120 companies under one roof, including well-known mail order companies such as Otto, Baur, Bonprix, Heine, Manufactum, Schwab and Sportscheck. The company now operates under the same name in Austria, Great Britain and Italy. At the end of 2010, Hermes bundled most of the air freight volume arriving in Europe at Leipzig/Halle Airport. Since May 2011, IDS has been working with Hermes Einrichtungs Service on its new B2C 2Man service for private customers. At the beginning of 2012, Hermes and DPD founded a joint venture to set up a parcel shop network under the Hermes-DPD brand. In 2014, Hermes entered into a strategic partnership with Itella in the Russian market.
Locations
Hermes is present in the most important European e-commerce markets: Hermes is active in Germany, Austria, Great Britain, France, Italy and Russia with its own national companies.
Customer Segments
The company is a leading specialist for trade-related services and a partner of numerous distance traders, multi-channel traders and online retailers at both national and international level.
Core Competencies
The range of services offered by the companies operating under the Hermes brand covers the entire retail value chain: sourcing, quality assurance, transport, fulfillment, parcel service, two-man handling and global e-commerce services.
Current Developments
With significant investments of more than 130 million Euros in modern infrastructure, customer-oriented services and digitization, the Hermes Group positioned itself for the future and expanded its market position in financial year 2017. By 2020, the Otto Group company is planning additional investments of around EUR 500 million across all business units. As has been the case for many years, Hermes is also driving sustainability ahead - for example through the increasing electrification of its vehicle fleets in Germany and the UK.
References: Fraunhofer SCS Research (**)

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