Competitiveness of Slovenian logistics

Slovenia your Logistics Gateway to Europe

Taipei, 10. September 2015
Excellent railway connections to hinterland markets;
Rail network Modern highway network;
Hinterland markets can be reached in less than 1 day.
An average of 62 trains / day.

Modal split

ROAD 79%
RAIL 14%
SEA 7%
Hinterland markets
Percentage of trade of goods

ITALY: 11.9%
CROATIA: 7.7%
GERMANY: 20.1%
AUSTRIA: 9.2%
HUNGARY: 3%
SLOVAKIA: 1.7%
CZECH REPUBLIC: 2.4%
CROATIA: 7.7%
BOSNIA AND HERZEGOVINA: 2.4%
SERBIA: 2.9%
Slovenia
Export oriented Economy
Exports: 74.7% of GDP

77% of Slovenian foreign sales was exported to EU

Export 2014: 23 billion € (+6.9%)

Import 2014: 22.65 billion € (+2.4%)

Source: Statistical Office of the Republic of Slovenia and CCIS
Capacity of road transport and forwarding sector

- 6,500 companies
- 28,458 professional drivers
- 31,303 trucks over 3.5t
- 713,000 m² surface area
- 231 warehouses
- 3,500 m² average surface area of warehouses
## Capacity of Railway Freight transport

### Slovenian Railways
**SŽ Cargo**

<table>
<thead>
<tr>
<th></th>
<th>Number</th>
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<tbody>
<tr>
<td>Wagons</td>
<td>3142</td>
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<tr>
<td>Locomotives</td>
<td>140</td>
</tr>
<tr>
<td>Diesel</td>
<td>70</td>
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<tr>
<td>E-loc</td>
<td>70</td>
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### Railway Freight transport 2009-2014

<table>
<thead>
<tr>
<th>Year</th>
<th>in mio. tonnes</th>
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<tbody>
<tr>
<td>2009</td>
<td>14,6</td>
</tr>
<tr>
<td>2010</td>
<td>17,2</td>
</tr>
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<td>2011</td>
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<td>2012</td>
<td>16,2</td>
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<tr>
<td>2013</td>
<td>17,6</td>
</tr>
<tr>
<td>2014</td>
<td>18,8</td>
</tr>
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</table>
Network of intermodal trains

- **Adria Express**
  Ljubljana (SLO) – Munich (GER)
  in Alliance with Kombiverkehr
  connections to/from GER and Benelux

- **Bosphorus Europe Express**
  Ljubljana (SLO) – Istanbul (TUR)
  in Alliance with EuropeIntermodal and Kombiverkehr

- **Kombi Express**
  Ljubljana (SLO) – Budapest (HUN)
  in Alliance with Hungaria Intermodal
  connections to/from HUN and ROM

- **Belgrade Express**
  Ljubljana (SLO) – Belgrade (SRB)
Rail-Port and Intermodal Terminal
Ljubljana

Marshalling yard
• Central marshalling yard in Slovenia
• Handling capacity of 4,000 wagons/day
• Wagon cleaning facilities
• Locomotive depot and maintenance facilities

Intermodal terminal
• 4 tracks @ 500 m
• 100,000 m² area
• Ro-La terminal
• Container depot for 2,500 TEU
• Transshipment capacity 700 TEU/day
• Repair shop

Warehousing & Transshipment
• Warehouse Customs office and warehouse
• In vicinity of largest shopping center area in Slovenia

Ljubljana
Ljubljana AIRPORT
Transport Association

600 members

2,5 bilion EUR revenue

48.652 EUR value added per employee

Passenger and freight transport companies
Forwardin&Logistic companies
Port logistics providers
Ship And Freight Agents
Port, airports and railway companies
Companies for technical inspection and registration of vehicles

23,920 employees

31,7 million EUR profit

www.sloarbitration.eu
Logistic industry performance indicators

- **2,996 companies**
- **33,021 employees**
- **4.3 billion EUR revenues**
- **6 % of SLO GDP**
- **48,652 EUR value added per employee**
- **7,408 EUR profit per employee**
- **4.27 % ROE**
Port of Koper – efficient combination of cost, time and energy saving

- more than 2,000 Nm shorter maritime route – up to 7 days shorter transit time by sea (if “slow steaming” at 12 knots)
- shipping 1 container (18 gross ton) from Far East (Shanghai) to Koper saves approx. 1.040 kg of CO₂ (source: http://www.poferrymasters.com/about-us/the-environment/co2-emission-calculator)
- alternative route to Europe (impact of SECA Regulation effective on 1st January 2015 in Baltic Sea, North Sea and English Channel)
Advantages of Koper

- Customs free zone. Free circulation of cleared goods, no further customs interference.
- Simplified procedures (24/7)
- Pre-clearing
- Clients oriented
Advantages of Koper

Coordinated „port community“
Dedicated to the business

Inovative & Flexible
Tailor made service
Container throughput by shipping line in Port of Koper

Top 10 shipping lines in 2014

- MAERSK LINE
- CMA CGM
- MSC
- EVERGREEN LINE
- HANJIN SHIPPING
- COSCO
- ZIM
- HAPAG LLOYD
- MITSUI O.S.K.
- YANG MING MARINE
Maritime connections

- regular **container, Ro-Ro** and **conventional** connections with all continents,
- numerous tramper, tanker and other dedicated services,
- more than 50 operators calling Koper on regular basis.

**Regular container services**
- weekly direct services with major Far East and SE Asian ports
- weekly Intra-Mediterranean services
- weekly services with hub/feeder ports in Mediterranean

![Map of maritime connections](image-url)
Direct container services operated by 2M

### West bound

<table>
<thead>
<tr>
<th>from</th>
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<th>Transit time</th>
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<tr>
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### East bound

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<td>NINGBO</td>
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<td></td>
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<tr>
<td>SHANGHAI</td>
<td>34</td>
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- Koper
- Port Said
- Pusan
- Shanghai
- Hong Kong
- Chiwan
- Vung Tao
- Tanjung Pelepas
- Singapore
Direct container services operated by Ocean3

**West bound**

<table>
<thead>
<tr>
<th>from</th>
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<tbody>
<tr>
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<td>PUSAN</td>
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<td>CHIWAN</td>
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<tr>
<td>PORT KLANG</td>
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<td>NINGBO</td>
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</table>

Cities and ports: Koper, Port Klang, Shanghai, Pusan, Ningbo, Chiwan, Malta.
Developing efficient and competitive container

“A daily average of 10-11 arrivals and 10-11 departures of block container trains to various destinations”
Shorter, Smarter, Partner
Thank You for your attention