

Germany - Transport and Logistics: Government vision to drive the industry (Strategy, Performance and Risk Analysis)

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Abstracts

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SUMMARY

Germany is home to some of the transport and logistics industry's leading players, such as Deutsche Post and Deutsche Bahn. As the country is positioned centrally in the EU, it is an ideal location for logistics hubs and distribution centers. These companies are involved in both domestic and international businesses and provide services across all major European countries. Deutsche Bahn has a strong position in the German rail transport market, including passenger and freight transport; and operates in 130 countries.

MarketLine's Premium industry reports provide a comprehensive overview of the market and include sections on: risk and reward, key industry trends and drivers, SWOT analysis, competitive landscape, innovation, deals, key developments, and industry benchmarking to compare key performance indicators with regional and global markets.

Key highlights

Rail transport GVA continues to decline

GVA from rail transport registered a CAGR of -2.1% during 2012-2017, falling from US\$18.2bn to US\$16.4bn. The decline was attributed to a decrease in the number of international rail passengers. International rail passengers registered a CAGR of -5.4%,

from 5.3 million in 2012 to 4.1 million in 2017. GVA is anticipated to continue to post a CAGR of -5.6% over 2018-2022, from US\$15.3bn to US\$12.1bn

Increasing trade to help drive air freight

In Germany, air freight traffic registered a CAGR of -1.1%, from 7,237.0 million ton km in 2012 to 7,097.9 million ton km in 2017. The decline is mainly attributed to infrastructure challenges and service delays. However, it is anticipated to post a CAGR of 1.0% over 2018-2022, rising from 7,178.3 million ton km to 7,469.5 million ton km as the country bolsters trade with China, France, and the US.

Warehousing and storage GVA to decrease over 2018-2022

Germany's warehousing and storage GVA accounted for 37.5% of total transport and logistics industry GVA in 2017. However, warehousing and storage GVA registered a CAGR of -2.0%, from US\$55.5bn in 2012 to US\$50.1bn in 2017; a decline in transport services, led by a decline in the productivity of different sectors, negatively affected GVA. A lack of investment in building new facilities and innovation deterred growth. Over the forecast period, GVA from warehousing and storage is anticipated to decline at a CAGR of -4.8%, from US\$46.6bn in 2018 to US\$38.2bn in 2022.

SCOPE

Risk & Reward Index: The Risk & Reward index compares the position of Germany's transport and logistics industry with other countries in the region in terms of specific risk and reward parameters.

Industry Snapshot and Industry View: Key transport and logistics industry statistics include freight traffic, freight volume, fleet size, passengers, import and exports, gross value added, FDI and trends driving market performance.

Industry SWOT Analysis: Discover the strengths, weaknesses, opportunities and threats impacting market performance and investment in Germany's transport and logistics market.

Industry Benchmarking: Benchmark how Germany's transport and logistics market is performing compared to regional and global markets in terms of GVA, fleet size and freight traffic by mode.

Competitive Landscape: Overview of industry players compared with their peers across a set of indicators.

REASONS TO BUY

How is the market performing in terms of indicators such as freight traffic, freight volume, fleet size, passengers, import and export, gross value added and FDI?

How risky is it to invest in the German transport and logistics industry compared to other countries in Europe?

What is driving the performance of key industry segments such as land, air, water and rail?

Who are the leading players in the German transport and logistics industry and what is their presence in their respective segments?

What trends are being witnessed within the German transport and logistics industry?

What are the German transport and logistics industry's strengths and weaknesses and what opportunities and threats does it face?

What are the recent developments and innovations in the German transport and logistics industry?

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