

# Actual situation and Master Plan for the development of the Supply Chain Market in Greece

EUROPEAN CONFERENCE ON  
4<sup>TH</sup> 4 TRANSPORT LOGISTICS ICT  
←←

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Thessaloniki, 13 October 2011

Greek Logistician in the Heart of the Greek Market and Economy



The country is on crisis...

适合 = 适  
Crisis = Threat

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## Actual situation

### Greek Logistics Market

- ✓ ttl size decrease of 6,1% - 2009 vs 2008
- ✓ additional ttl size decrease of 7% - 2010 vs 2009
- ✓ In contradiction with a continuous ttl growth of an avg yearly 19,68% for the previous 10 years, 1998-2008

(ICAP research for the logistics sector)

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## Greek Freight Transport & Logistics Market

- ☑ 3,4% decrease of the turnover Index - 2010 vs 2009
- ☑ 13,4% decrease of the operational profit index - 2010 vs 2009
- ☑ In a total of 367 companies, 39% with losses and only 61% showing profit, out of which almost 40% with significant lower profit vs previous year

(Hellastat study for the logistics sector, 2008-2010)

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## Greek Freight Transport Market

### Land transport and transport via pipe lines - Turnover indices

- ☑ 31,5% decrease of the avg annual turnover Index, 2009 vs 2008
- ☑ 18,1% additional decrease of the avg annual turnover Index, 2010 vs 2009
- ☑ 17,4% decrease of the turnover Index , 1<sup>st</sup> quarter of 2011 vs 1<sup>st</sup> quarter of 2010
- ☑ 1,5% increase of the turnover Index , 2<sup>nd</sup> quarter of 2011 vs 2<sup>nd</sup> quarter of 2010

(Hellastat data, 2011)

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## Greek Freight Transport Market

### Waterways transport - Turnover indices

- ☑ 22,8% decrease of the avg annual turnover Index, 2009 vs 2008
- ☑ 8,5% additional decrease of the avg annual turnover Index, 2010 vs 2009
- ☑ 1,2% decrease of the turnover Index , 1<sup>st</sup> quarter of 2011 vs 1<sup>st</sup> quarter of 2010
- ☑ 8,7% decrease of the turnover Index , 2<sup>nd</sup> quarter of 2011 vs 2<sup>nd</sup> quarter of 2010

(Hellastat data, 2011)

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## Greek Freight Transport Market

### Airtransport - Turnover indices

- ☑ 12,6% decrease of the avg annual turnover Index, 2009 vs 2008
- ☑ 3,3% additional decrease, 2010 vs 2009
- ☑ 6,1% increase of the turnover Index , 1<sup>st</sup> quarter of 2011 vs 1<sup>st</sup> quarter of 2010
- ☑ 26,3% increase of the turnover Index , 2<sup>nd</sup> quarter of 2011 vs 2<sup>nd</sup> quarter of 2010

(Hellastat data, 2011)

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## Greek Freight Transport Market

### Warehousing & transportation support activities - Turnover indices

- ✓ 33,3% decrease of the avg annual turnover Index, 2009 vs 2008
- ✓ 10,9% additional decrease of the avg annual turnover Index, 2010 vs 2009
- ✓ 10,6% decrease of the turnover Index , 1<sup>st</sup> quarter of 2011 vs 1<sup>st</sup> quarter of 2010
- ✓ 13,6% decrease of the turnover Index , 2<sup>nd</sup> quarter of 2011 vs 2<sup>nd</sup> quarter of 2010

(Hellastat data, 2011)

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# The country is on crisis...

适合 = 适 + 合

Crisis = Threat + Opportunity

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## ***Gold Opportunity vs crisis***

**Next step for the Greek Supply Chain Market, which represents:**

- **6,5% of Greek GDP**

(1<sup>st</sup> Panhellenic research for the Greek Supply Chain Market sector - Ministry of Development and EEL - 2007)

- **10%-12% of the Greek GDP**  
based on worldwide and paneuropeean data

**The existence and implementation of the Greek Master Plan**  
according to the results of 2<sup>nd</sup> Panhellenic research for Master Plan-EEL 2009

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13<sup>th</sup> Panhellenic Logistics Congress

# MASTER PLAN IN LOGISTICS

CHALLENGING THE CRISIS  
CREATING **OPPORTUNITIES**



Εκπρόσωπος των:



International Society of Logistics

European Logistics Mediterranean



13-14 November

Zappeio Megaro, Athens

2009



- Master Plan of the Freight Transport and Logistics Market in Greece (Greek Master Plan)
- The German Master Plan for Freight Transport & Logistics
- Paneuropean practice
- 2<sup>nd</sup> Panhellenic research for Master Plan (EEL - 2009)

All of the above were sent to Greek Prime minister's office and to 7 co-ministries targeting a proposal of finding a solution of exceeding the crisis on an effort to further develop the Greek Supply Chain Market.

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Elliniki Etaireia Logistics (EEL) is a member of the new Logistics Committee of the Greek Ministry of Infrastructures, Transport and Networks, which has a double role:

- Introductory for direct law making
- Permanent consulting

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ΕΛΛΗΝΙΚΗ ΕΤΑΙΡΕΙΑ ΛΟΓΙΣΤΙΚΗΣ



# Master Plan of Freight Transport and Logistics Market in Greece

## *Strategic Objectives*

- Strengthen the Greek Freight Transportation and Logistics market
- Transform Greece as Transit Hub of Balkans and Southeastern Europe

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| Table 1: National Supply Chain Market : various sectors                   |  |  |
|---|--|--|
| Direct  | Indirect   | Possible ways of evaluation  |
| Transportation, logistics and supply directions of various companies      | Customs Brokers                                  | Turnover<br>% on G.D.P<br>Number of employees<br>Tons of transported cargo-freight |
| Transporters  | Insurance Brokers                                |  |
| Transportation Agencies   | Business Consultants                             |  |
| Truck Drivers   | Pallets trading Companies                        |  |
| Airports  | Forklifts trading Companies                      |  |
| Airlines  | Packing trading Companies                        |  |
| Railway Organizations   | Trucks trading Companies                         |  |
| Companies Supplying Railway services                                      | Banks - Banks logistics departments              |  |
| Ports   | Software development Companies                   |  |
| Ports Operating Companies   | Army and military Services Logistics departments |  |
| Maritime Companies  | Hospital Logistics departments                   |  |
| Freight Centers   | Event logistics                                  |  |
| Logistics Centers   | Athletic events Logistics                        |  |
| 3 <sup>rd</sup> or 4 <sup>th</sup> Party Logistics Providers (3PL or 4PL) | Courier-express Service - Post Office            |  |
| River transportation Companies  |  |  |

(EEL's publications)

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Council of Supply Chain Management Professionals

International Society of Logistics



European Logistics Mediation

ELMED European Logistics Mediation

**Table 2: Logistics, percentage on GDP**

| Country     | GDP in US\$m | Logistics in US\$m | % of GDP |
|-------------|--------------|--------------------|----------|
| Mexico      | 334,726      | 49,753             | 14.9     |
| Ireland     | 67,392       | 9,611              | 14.2     |
| Singapore   | 94,063       | 13,074             | 13.9     |
| Hong Kong   | 153,068      | 20,992             | 13.7     |
| Germany     | 2,352,472    | 306,264            | 13.0     |
| Taiwan      | 273,440      | 35,686             | 13.0     |
| Denmark     | 174,237      | 22,440             | 12.8     |
| Portugal    | 101,182      | 12,871             | 12.7     |
| Canada      | 585,105      | 70,191             | 12.0     |
| Japan       | 4,599,706    | 522,982            | 11.3     |
| Netherlands | 392,550      | 44,495             | 11.3     |
| Italy       | 1,214,272    | 137,027            | 11.2     |
| UK          | 1,151,348    | 122,344            | 10.6     |
| US          | 7,576,100    | 795,265            | 10.5     |

(Various studies-researches of above countries)

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## Master Plan of Freight Transport and Logistics Market in Greece

### *Strategic Objectives*

- Strengthen the Greek Freight Transport and Logistics Market sector
- Transform Greece to the Logistics Hub of Balkans and Southeastern Europe

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Association of

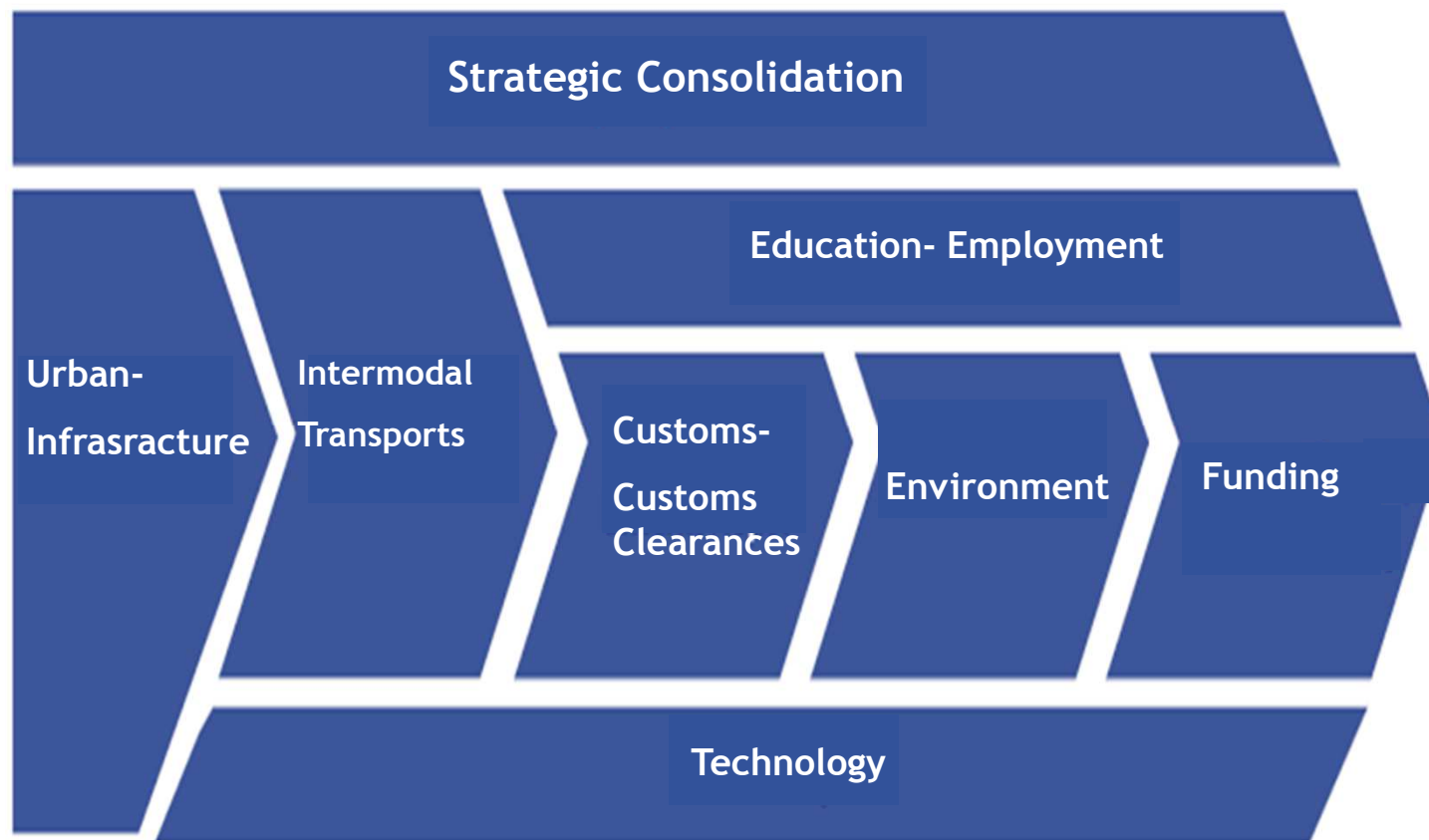
Council of Supply Chain  
Management Professionals

International Society of Logistics

Ελληνική Εταιρεία Λογιστικής  
Ευρωπαϊκή Εταιρεία Λογιστικής  
Εθνική Εταιρεία Λογιστικής

ELMED European Logistics Mediterranean

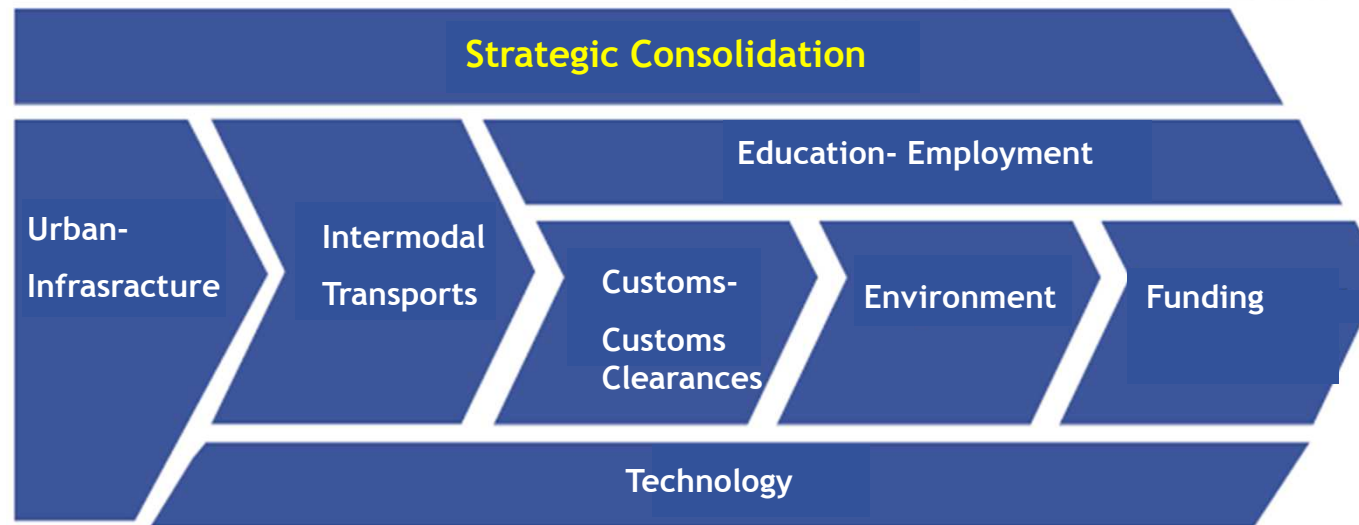
## Strengthen the Greek Freight Transportation and Logistics Market sector



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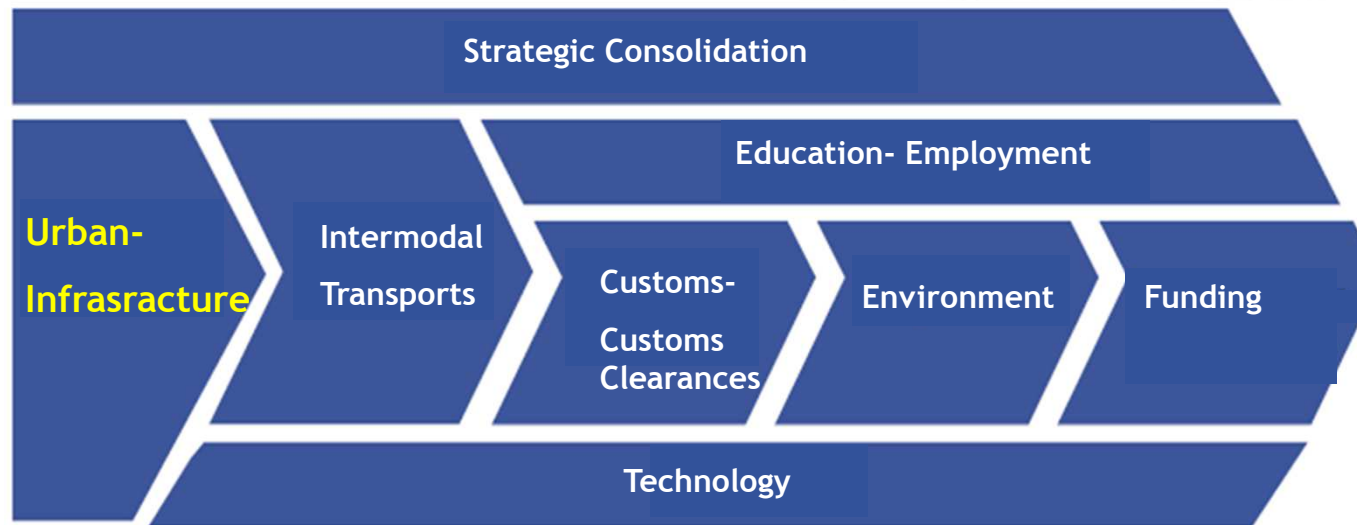


- Mapping of operators with common vision and strategy
- Creation of Operators Committee with common vision and strategy
- Creation of standard strategic planning, in order to develop aligned business plans and strategies

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- National land planning map
- Logistics areas definition
- Logistics Centers
- Freight Transport Infrastructures optimization
- Avoid unnecessary transports - facilitate traffic

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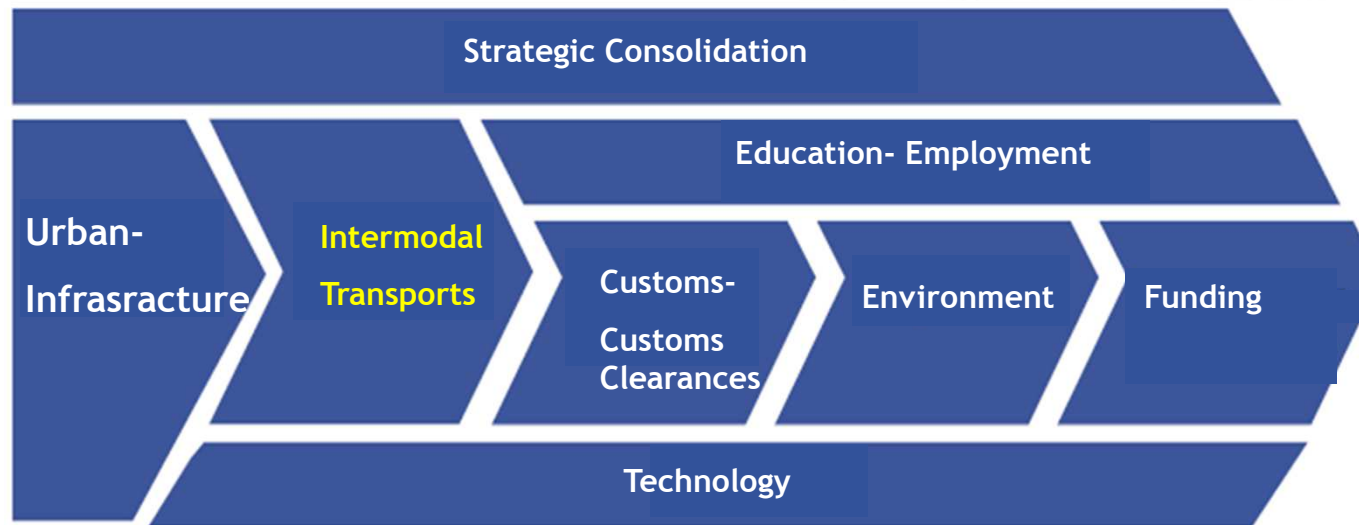
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- National committee for the development of intermodal transports
- Modernization of rail and road transports
- Synergies between Sea-Air transports

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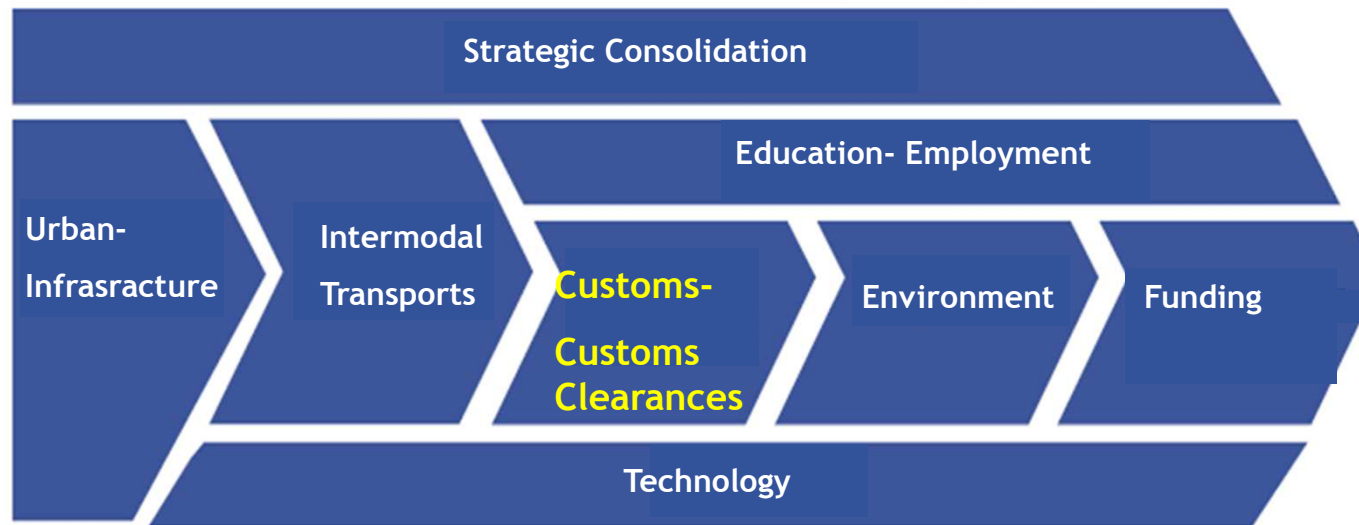
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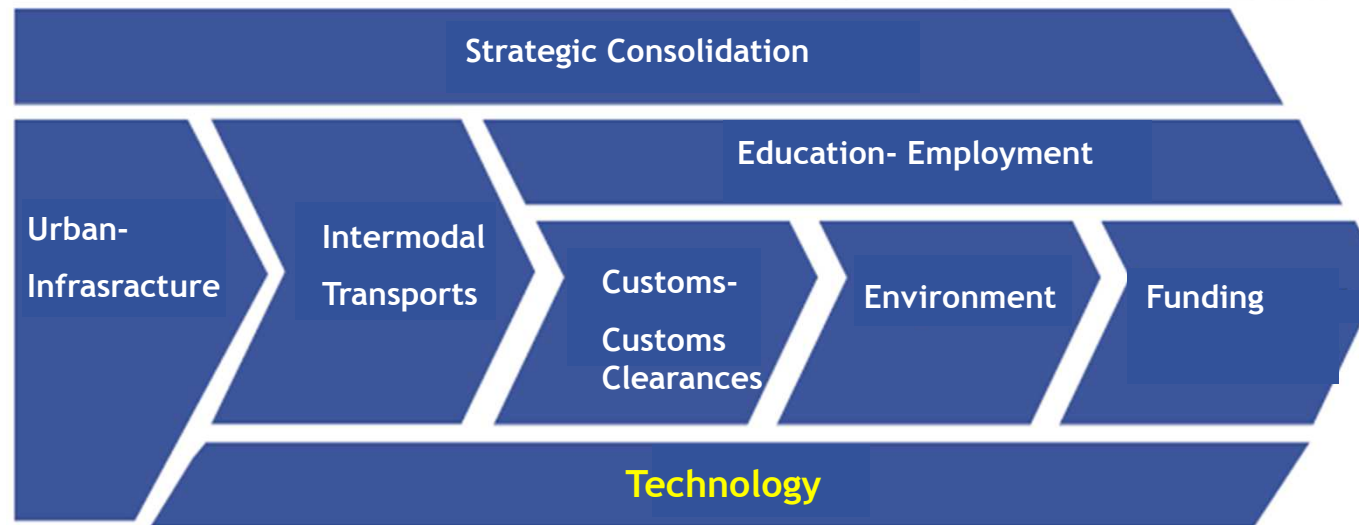


- Customs Clearance costs in time and money
- e-customs - simple procedures

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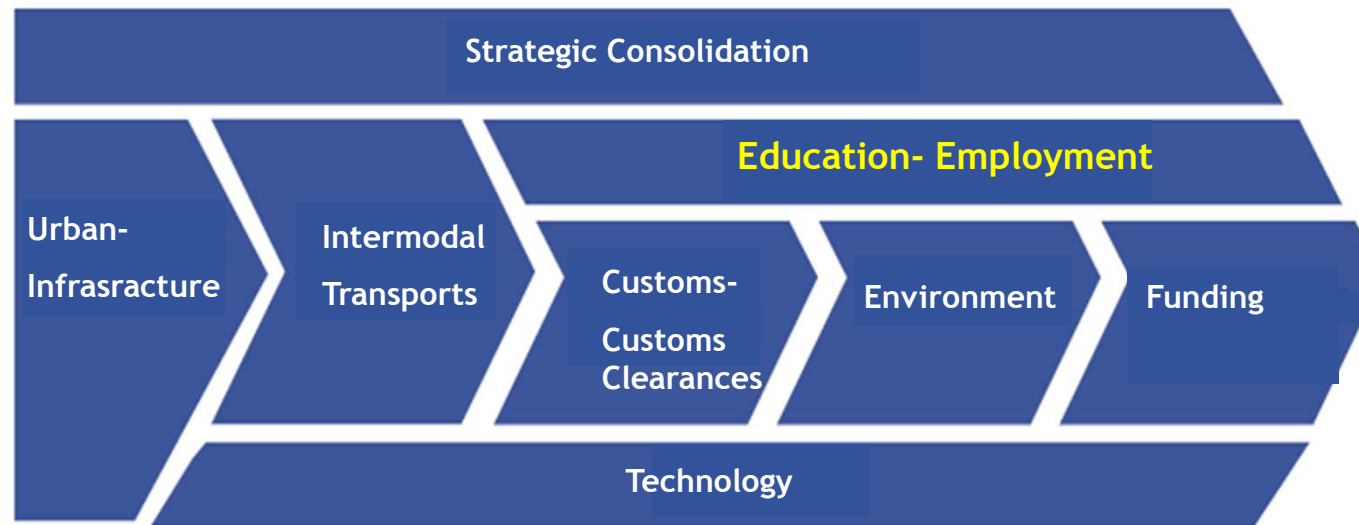


- Mapping of several systems that organizations, operators and companies of the market should have in order to be competitive
- Marketplaces, clusters, digital connections for operators of freight transport and logistics organizations

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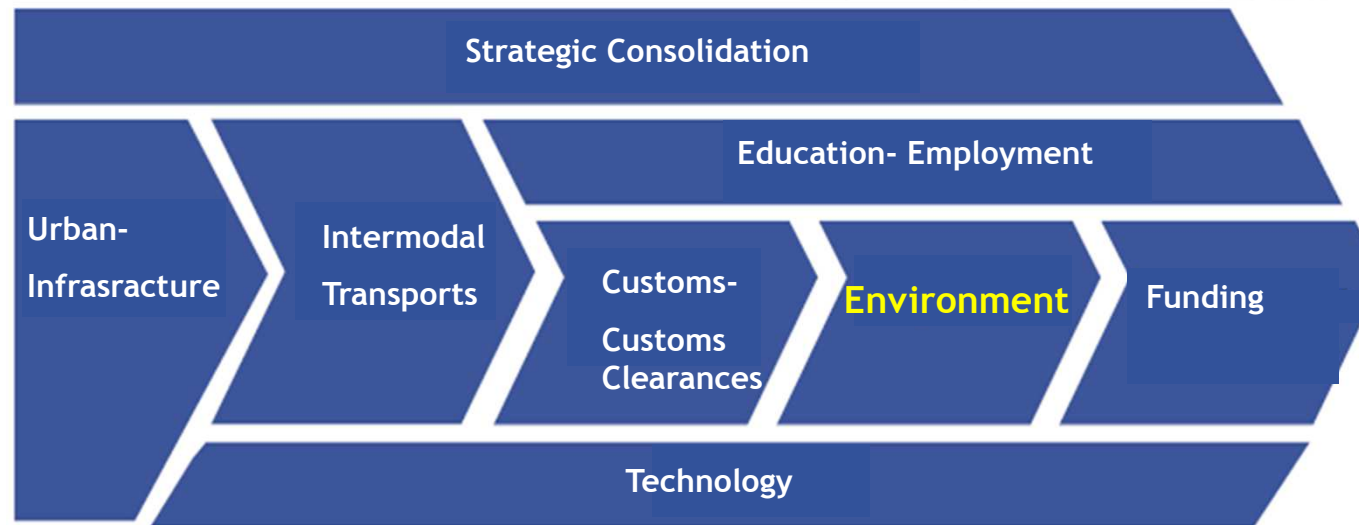


- Mapping of several educational needs per cluster
- Keep record of all day to day market labor issues

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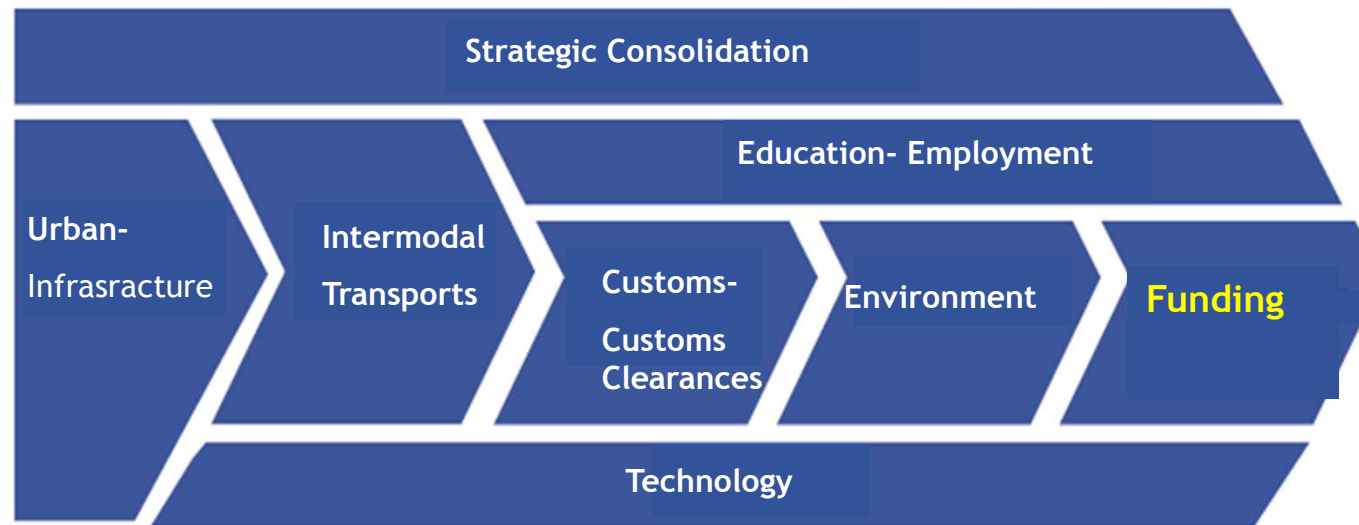


- Develop politics and rules that will differentiate road transportation
- Keep record of the pollution ways and rate of the environment-connection with environmental standards
- Reduction of pollutant emission, noise
- New technologies

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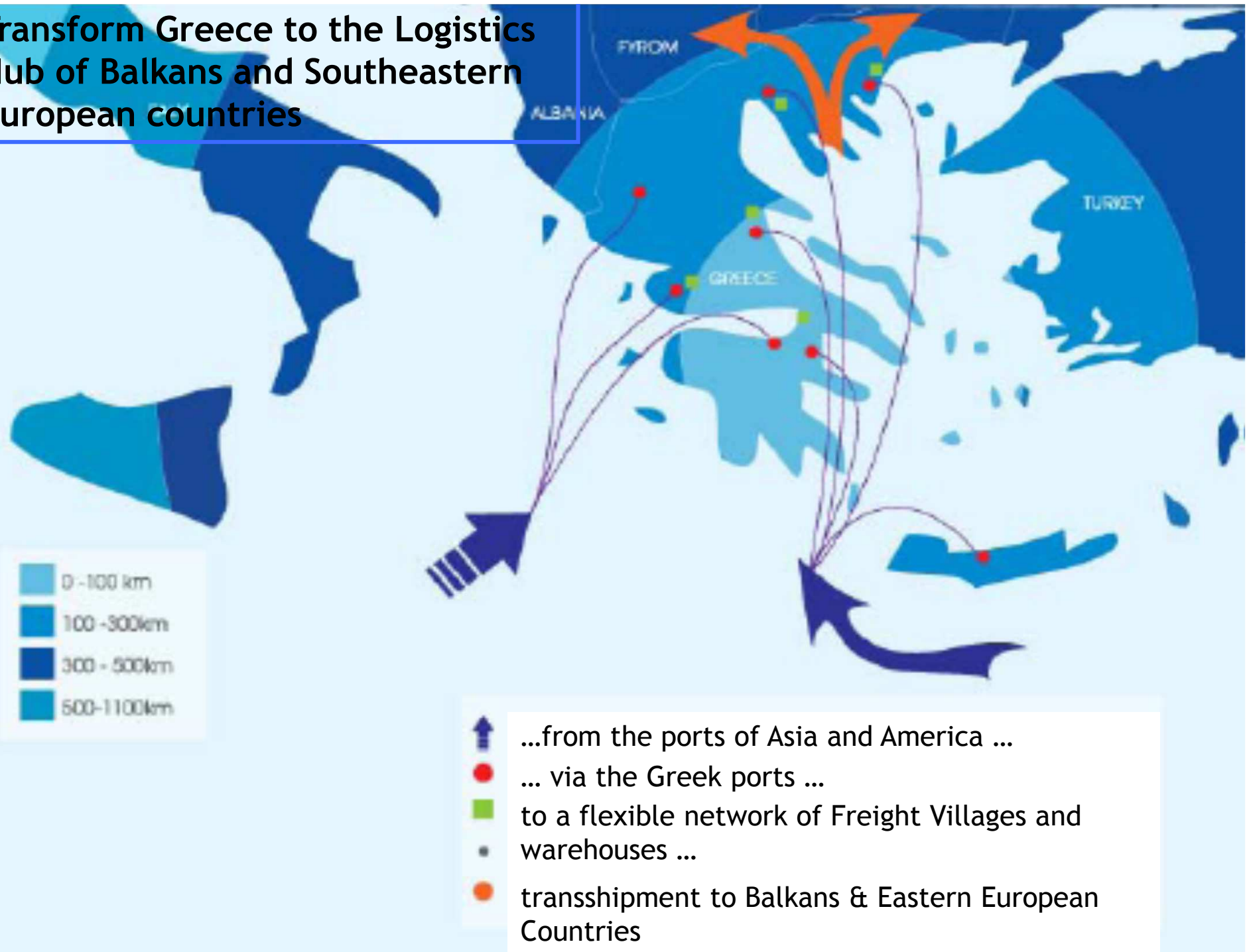


- Keep record of the real needs of the market for funding especially according to results of the specific Master Plan in order for the funding to be targeted towards this market

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## Transform Greece to the Logistics Hub of Balkans and Southeastern European countries



... reallocating the financial “banana” of Western Europe

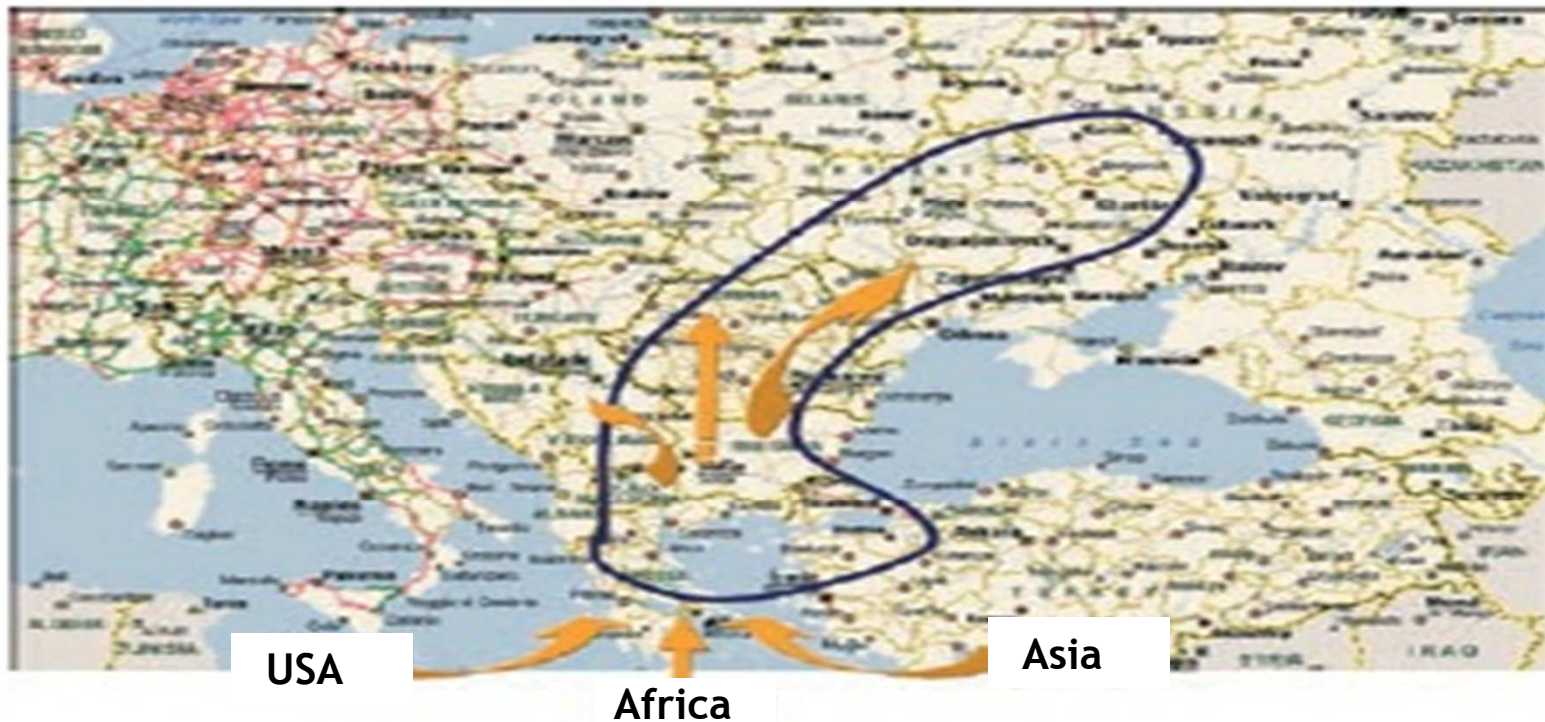


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... servicing emerging, fast growing markets of  
Balkans and Southeastern Europe



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... with Greece as a central freight Gate to Europe instead of Holland and Germany



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## Master Plan of the Freight Transport and Logistics Market in Greece (Greek Master Plan)

- a very ambitious project
- focusing on Supply Chain Market Development and Greek Economy reinforcement
- with many participants
- demanding synergies and networking

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## The Company Profile

- ✓ Elliniki Etaireia Logistics (EEL), established in 1994, representing, at this time, the International Society of Logistics (S.O.L.E./ U.S.A.) in Greece.
- ✓ All these years EEL has developed several activities and actions as to promote and establish the Logistics and Supply Chain concept, science and practice to the Greek market and Greek Economy
  - ✓ More than 60 business logistics meetings
  - ✓ 14 Panhellenic Logistics Congresses
  - ✓ Researches-actions with the relevant to the supply chain services Ministries
  - ✓ Articles, publications, participations to exhibitions etc.
- ✓ Today, with more than 500 members, we promote the Greek Logistician and Greece as the Logistics Facilitator for cargo flows to Balkans and Southeastern Europe.

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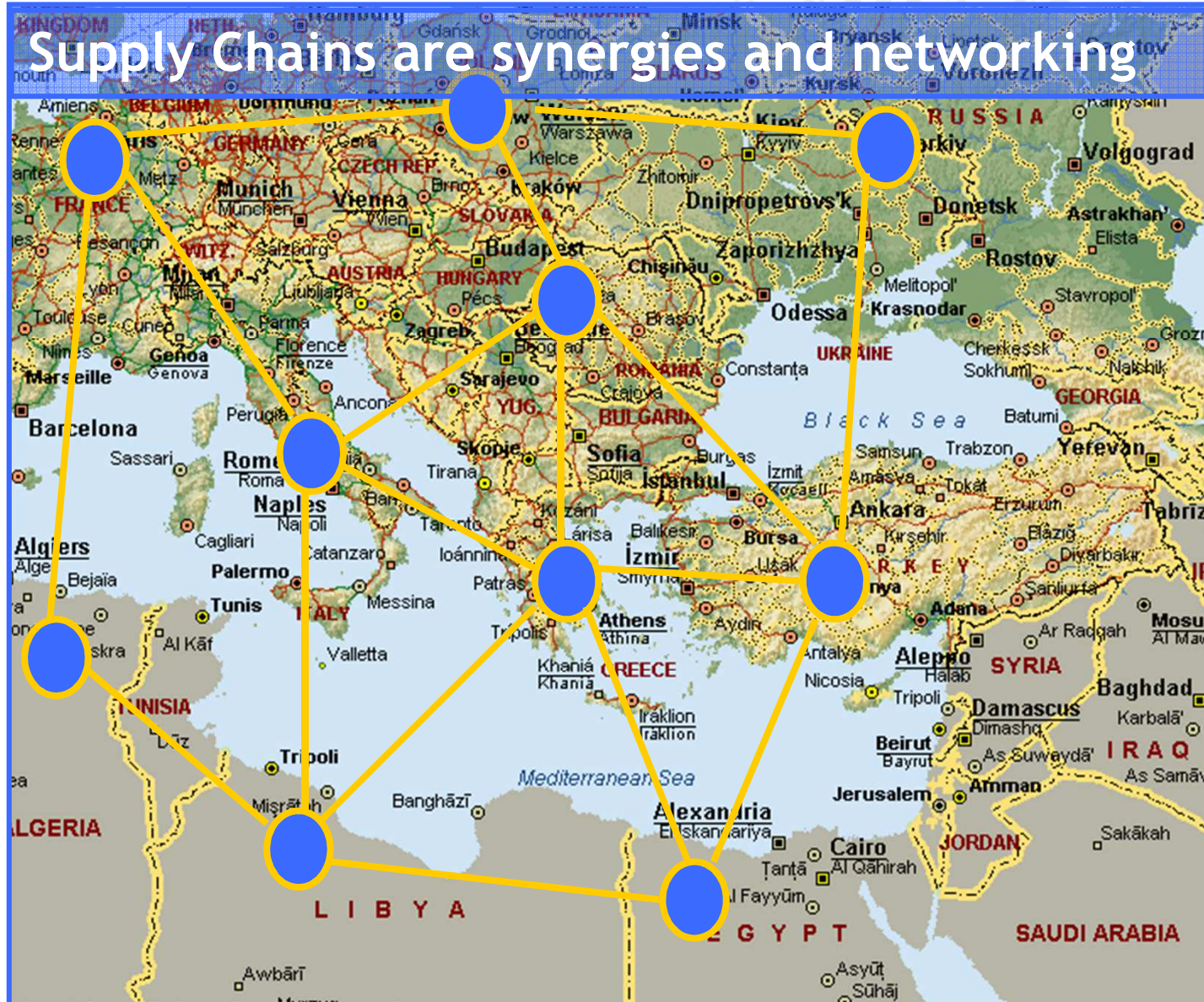




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# Supply Chains are synergies and networking



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## EEL anticipates to strategic partnerships

✓ EEL wants and needs to sign strategic MOUs with similar associations in neighbor countries as to start creating the networking in Supply Chains

- ✓ Common research projects
- ✓ Business relations between the members of the organizations
- ✓ Business Contacts
- ✓ Exchange of experience
- ✓ Participation in Congresses - Business Meetings
- ✓ Appointment of Mediterranean countries to Mediterranean Supply Chain Leaders

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## EEL represents in Greece the following associations:



Council of Supply Chain Management Professionals

International Society of Logistics



SOLE-The International Society of Logistics



European Federation of Inland Ports

**ELMED** European Logistics Mediterranean

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## ELLINIKI ETAIREIA LOGISTICS

«The Official Association for Supply Chain Professionals in Greece»

**Thank you!**

*Visit us at [www.eel.gr](http://www.eel.gr)*

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