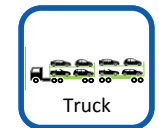
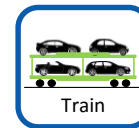
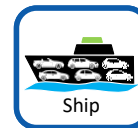


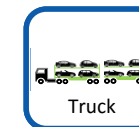
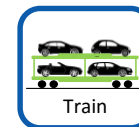
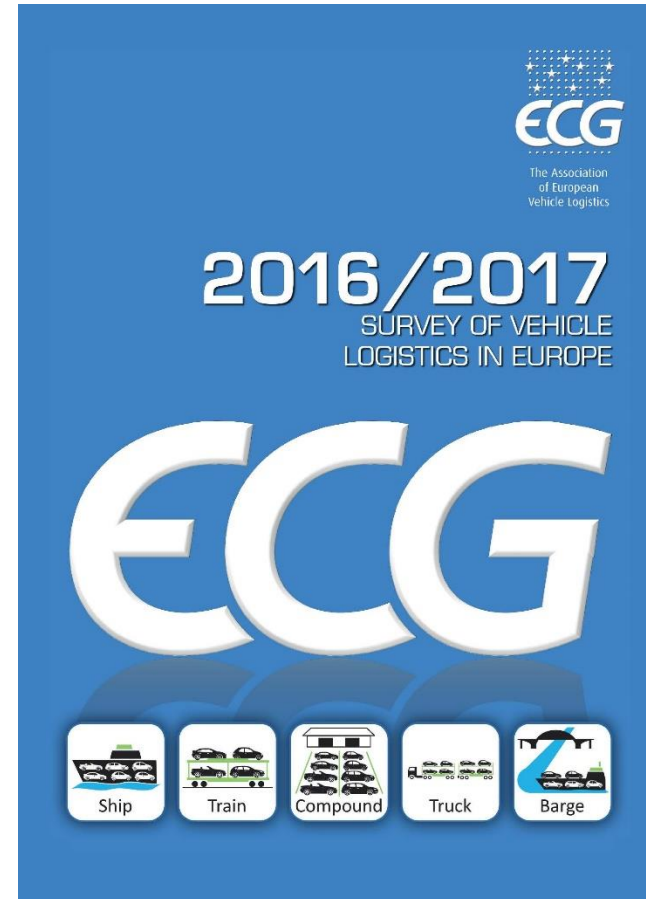


Survey of Vehicle Logistics in Europe



Introduction

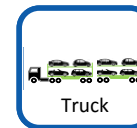
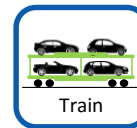
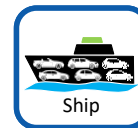
- ECG Survey of Vehicle Logistics in Europe (“Biennial Survey”) is prepared every two years
- The last Survey was launched in October 2016 at the ECG Conference in Hamburg
- This is the only publication for the European Vehicle Logistics sector, also covering Russia, Turkey and Ukraine
- Next Survey will be prepared in March-October 2018





Sources

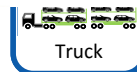
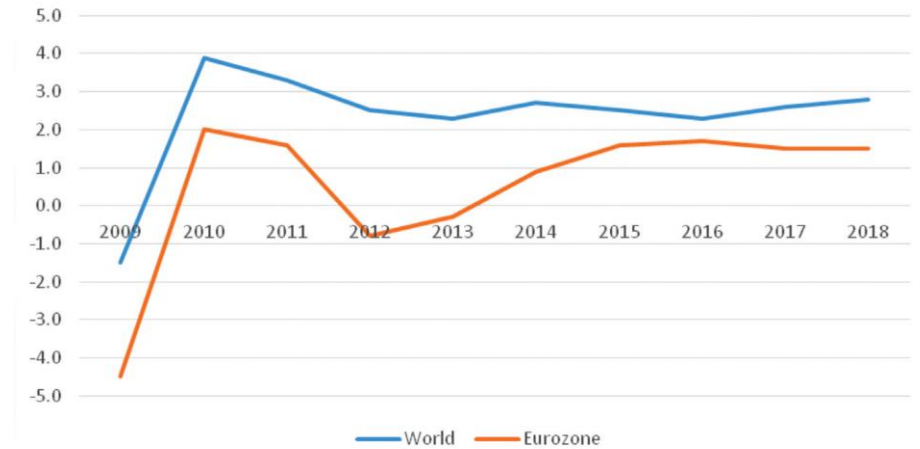
- The automotive industry economic outlook is provided by **LMC Automotive**
- Data in the Survey comes from various sources: **IHS, ACEA, CEMA, Eurostat, OICA**
- The country-by-country analysis is performed by the **ECG Survey Working Group** which brings together logistics experts from member companies from all around Europe
- For the sales forecast for each country ECG has a long-standing co-operation with **IHS**
- **ECG members** provide data on their business and internal structure



Industry outlook



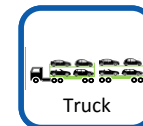
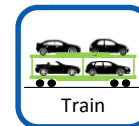
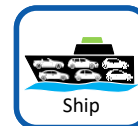
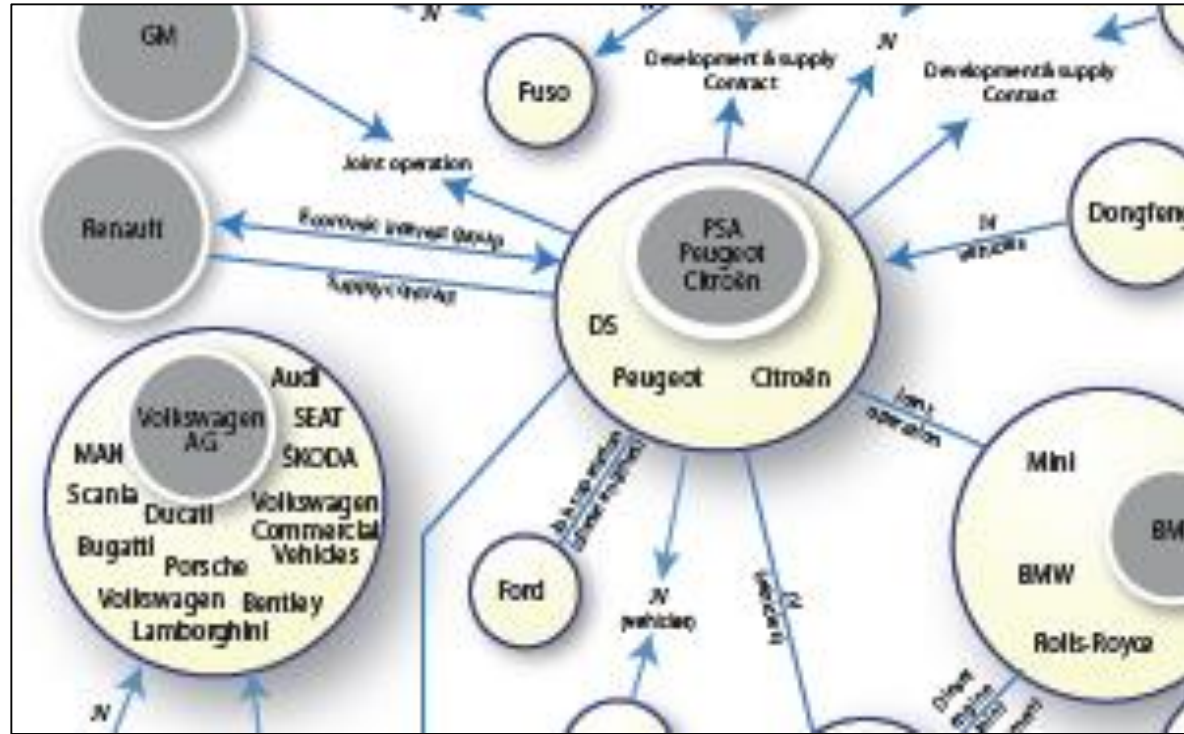
- The 2016/2017 edition of the Survey provided a market analysis by LMC Automotive on passenger car and commercial vehicle registrations in Europe



The automotive universe



- The Survey gives a detailed picture on the co-operation between car manufacturers and their different brands

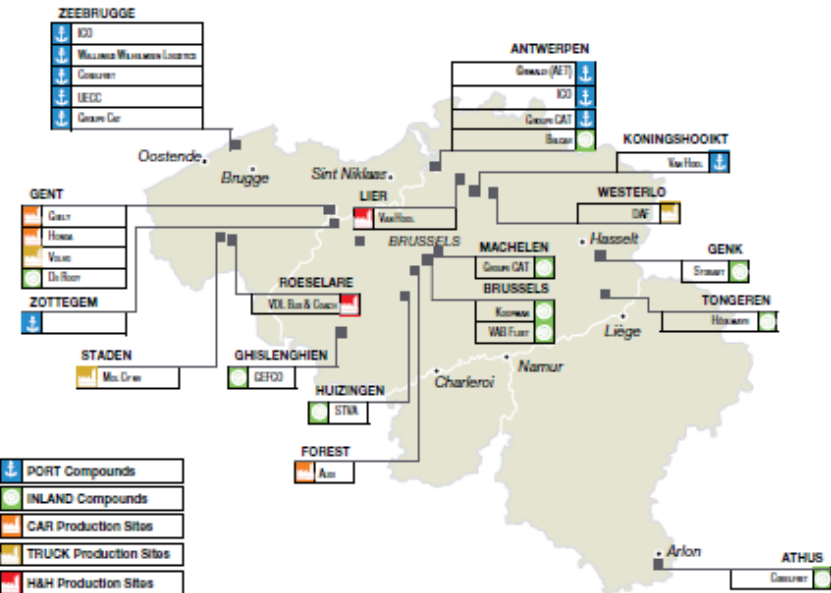


Country-by-country analysis

- The Survey provides information on production sites in each country together with the sales and production forecast of cars and LCV.
- The data on production sites is gathered by the ECG Working Group and the forecast data comes from IHS.



BELGIUM



PORT COMPOUNDS					
Operator	City	Rail connection	Storage capacity (sqm)	Workshop (sqm)	Services provided ¹⁾
COBELFRET	ZEEBRUGGE	not an ECG member at the time of going to press			
GRIMALDI (ANTWERP EURO TERMINAL)	ANTWERPEN	YES	1,324,000	8,000	1, 2, 3, 4, 5
GROUP CAT	ANTWERPEN	YES	100,000	7,500	1, 2, 3, 4, 5
	ZEEBRUGGE	YES	150,000	4,000	1, 2, 3, 4, 5
ICO	ANTWERP (MASENE TERMINAL)	YES	1 250 000	12 000	1, 2, 3, 4, 5
	ZEEBRUGGE (BASTENAKEN TERMINAL)	YES	1 000 000	4 000	1, 2, 3, 4, 5
	ZEEBRUGGE (HANGE TERMINAL)	YES	150 000	0	1
	ZEEBRUGGE (NORTHERN INLET TERMINAL)	YES	590 000	6 000	1, 2, 3, 4, 5
IECC	ZEEBRUGGE (BASTENAKEN TERMINAL)	YES	900 000	6 000	1, 2, 3, 4, 5
	ZEEBRUGGE (NORTHERN INLET TERMINAL)	YES	590 000	6 000	1, 2, 3, 4, 5
WALLENIUS WILHELMSEN LOGISTICS	ZEEBRUGGE	YES	490 000	12 100	1, 2, 3, 4, 5

¹⁾ 1 = Storage 2 = Pre-Delivery-Inspection (PDI) 3 = Mechanical/Technical Services 4 = Refurbishment 5 = Paint

INLAND COMPOUNDS					
Operator	City	Rail connection	Storage capacity (sqm)	Workshop (sqm)	Services provided ¹⁾
STOBART	GENK	YES	110,000	825	1, 2, 3, 4
GRUPE CAT	MACHELEN	YES	150,000	3,000	1, 2, 3, 4, 5
COBELFRET	ATHUS	not an ECG member at the time of going to press			
DE ROOY	GENT	NO	20,000	0	1
GEFCO	GHSLENGHIEN	YES	374,900	9,000	1, 2, 3, 4, 5
GEVA	ZOTTEGEM	NO1	500	150	1
KOOPMAN	BRUSSELS	NO	2,000	1,000	4, 5
HÖLTMAYR INTERNATIONAL AG	TONGEREN	YES	132,000	0	1, 2, 3, 4, 5
STVA	HUIZINGEN	NO	0	0	-

¹⁾ 1 = Storage 2 = Pre-Delivery-Inspection (PDI) 3 = Mechanical/Technical Services 4 = Refurbishment 5 = Paint



Sales forecast for each country



SALES FORECAST PERSONAL VEHICLES							
Group	Brand	CY 2014	CY 2015	CY 2016	CY 2017	CY 2018	CY 2019
FARADAY FUTURE	FARADAY FUTURE	0	0	0	0	0	3
FCA	ALFA ROMEO	47	37	136	218	248	316
	FERRARI	0	0	0	0	0	0
	FIAT	591	568	814	1,222	1,523	2,079
	JEEP	46	66	61	61	148	180
	LANCIA	23	3	24	14	14	13
	MASERATI	3	4	4	3	3	4
FORD	FORD	1,754	2,037	2,483	2,199	2,661	2,607
FUJI HEAVY	SUBARU	46	75	66	94	77	137
GELY	VOLVO	176	192	260	272	376	452
GENERAL MOTORS	CADILLAC	0	1	0	0	0	0
	CHEVROLET	219	1	0	0	0	0
	OPEL	3,765	3,700	4,254	4,339	5,020	5,746
GREAT WALL	GREAT WALL	0	0	0	0	14	58
HONDA	HONDA	253	189	195	580	676	675
HYUNDAI	HYUNDAI	1,627	965	1,518	1,752	2,433	2,336
	KIA	1,218	1,763	1,144	2,040	3,026	3,219
MAHINDRA & MAHINDRA	SSANGYONG	0	0	0	0	5	21
MAZDA	MAZDA	1,059	1,041	1,062	1,047	1,251	1,915
MITSUBISHI	MITSUBISHI	208	278	182	202	328	529
MORGAN	MORGAN	0	1	0	0	0	0
OTHERS	OTHERS	2	0	2	0	0	0
PSA	CITROEN	1,896	1,453	1,904	2,343	2,855	2,622
	DS	69	67	45	57	117	180
	PEUGEOT	2,268	1,977	2,249	2,387	2,354	2,343
RENAULT/NISSAN	DAICHA	1,018	1,852	1,796	1,453	1,552	1,255
	INFINITI	4	18	25	13	33	54
	LADA	13	1	0	0	0	64
	NISSAN	962	795	811	790	1,096	1,246
	RENAULT	2,148	2,788	4,241	4,582	3,993	4,362
SUZUKI	SUZUKI	541	1,240	1,897	2,457	2,344	1,860
TATA	JAGUAR	5	8	57	84	106	95
	LAND ROVER	34	75	93	106	150	202
	TATA	0	1	0	0	0	0
TESLA MOTORS	TESLA	4	5	20	26	37	49
TOYOTA	LEXUS	3	10	19	20	41	56
	TOYOTA	1,516	1,228	1,656	1,713	1,579	2,061

Members page

- Each ECG member has a page where the main company data are published, containing subsidiaries, financial figures and assets, as well as the list of the top management.



Autoverslas, UAB

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 Web: www.autoverslas.lt

SUBSIDIARIES

Autoverslo transportas, UAB - automotive sector, own and sub-fleet;
 Autoverslo terminalas, UAB - compound management, railway, automotive (production);
 Autoverslo logistika, UAB - general cargo logistics, warehouses management, customs;
 ATS logistics, UAB - partial general cargo logistics, warehouses management, customs;
 Gaisrė, UAB - liquid cargo / food transportation, own fleet management (cisterns);

STABLE ORGANISATION (COUNTRIES)

Lithuania (Vilnius, Vievis, Klaipėda)

SERVICES PROVIDED (COUNTRIES)

EU	Kyrgyzstan	General cargo (containers shipping) to USA
Belarus	Mongolia	
Russia		South America
Kazakhstan		Canada
Tajikistan		Thailand
Turkmenistan		
Uzbekistan		

MANAGEMENT

President/Chairman
 Valdemaras Zakarauskas
Managing Director
 Rūta Gvzdaitienė
Operations Director
 Vidmantas Baršauskas
Finance Director
 Marina Aleksienė
Quality and Process
 Darius Dolmatas
Commercial
 Alfredas Oras

MAIN FIGURES 2015

Total turnover (€)	4,125,952	Total vehicles handled	43,000
Employees	220	National transport (%)	18
	(In Autoverslas Group)	International transport (%)	82
	11 administrators	Inland compounds	3
	49 drivers	Port compounds/ Port terminals	1
	(In Autoverslo transportas)	Storage area (m²)	35,000
Trucks (owned/ leased)	47	<small>(closed warehouses) /</small>	200,000
Trucks (full time subcontracted)	45	<small>(open area-storage)</small>	
Wagons (owned)	0	Workshop area (m²)	3,500
Wagons (chartered)	40		
Ships (owned)	0		
Ships (chartered)	0		
Barges (owned)	0		
Barges (chartered)	0		



Advertisement

- There is also a possibility to publish an advertisement in the ECG Survey for members and all other companies wishing to benefit from the visibility this publication offers in the sector.
- ECG members benefit from a preferential rate for their advertisement.



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