Positioning and Establishment of the Freight Villages (FV) in Europe 2015

Management Summary

On behalf of:

Deutsche GVZ-Gesellschaft mbH

Universitätsallee 11-13
28359 Bremen
Deutschland

info@gvz-org.de
www.info@gvz-org.de

Institute of Shipping Economics and Logistics

Universitätsallee 11-13
28359 Bremen
Deutschland
Tel.: +49/4 21/2 20 96-0
Fax: +49/4 21/2 20 96-55

info@isl.org
www.isl.org
German Freight Village Association updated the European Freight Village Ranking

The study of the DGG entitled „Positioning and Establishment of the Freight Villages (FV) in Europe is the second of its kind. The first one was carried out by the DGG (involved by the institutes ISL and LUB) in 2010. The current study presents the state of development as well as the development perspective of the European freight villages.

The aim of the data collection is to give an overview to the actors of the single locations about the international field of logistics and to encourage the further development of macro logistics concepts in Europe.

Basis of the study is the definition of the European FV- association “EUROPLATFORMS” relating to freight villages¹. Accordingly only those locations were chosen that provide characteristics in following fields:

1. Intermodality
2. Structure of Management
3. Structure of Services

At the beginning of the survey over 240 locations from over 30 European countries were identified and contacted.

¹ (http://www.europlatforms.eu/logistic-center-definition/)
The following figure gives an overview of all locations, which took part in the survey. These locations are colored in blue.

Source: Own figure

The methodology of the analysis in the first European FV-Ranking from 2010 included 29 Benchmarks / Key Performance Indicators (KPI) within four clusters. The clusters were structure and development, management, transport modes and SWOT-analysis. The basis of the evaluation is formed by the KPI and their weightings. This methodology was used as the basis of the current survey.

The current ranking includes 40 Benchmarks / KPI divided into sixteen clusters (see figure on the left). The evaluation criteria were expanded by latest and urgent aspects, as “Green Logistics” and “Security Management”. Furthermore the position within the TEN-T corridor was observed to take into account the overview of the flow of goods in Europe.

Source: Own figure
The following table shows the TOP 20 of the European Freight Village Ranking 2015 in European comparison – TOP 20. Afterwards the main findings are mentioned and analysed.

**TOP 20 – Ranking 2015**

<table>
<thead>
<tr>
<th>Rank</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Interporto Verona</td>
</tr>
<tr>
<td>2</td>
<td>GVZ Bremen</td>
</tr>
<tr>
<td>3</td>
<td>GVZ Nürnberg</td>
</tr>
<tr>
<td>4</td>
<td>GVZ Berlin Süd Großbeeren</td>
</tr>
<tr>
<td>5</td>
<td>Plaza Logistica Zaragoza</td>
</tr>
<tr>
<td>6</td>
<td>Interporto Nola Campano</td>
</tr>
<tr>
<td>7</td>
<td>Interporto Padova</td>
</tr>
<tr>
<td>8</td>
<td>Interporto Bologna</td>
</tr>
<tr>
<td>9</td>
<td>GVZ Leipzig</td>
</tr>
<tr>
<td>10</td>
<td>Interporto Parma</td>
</tr>
<tr>
<td>11</td>
<td>ZAL Barcelona</td>
</tr>
<tr>
<td>12</td>
<td>Interporto di Torino</td>
</tr>
<tr>
<td>13</td>
<td>BILK Logistics Centre (Budapest)</td>
</tr>
<tr>
<td>14</td>
<td>Interporto Novara</td>
</tr>
<tr>
<td>15</td>
<td>CLIP Logistics (Poznan)</td>
</tr>
<tr>
<td>16</td>
<td>Delta 3 Dourges (Lille)</td>
</tr>
<tr>
<td>17</td>
<td>GVZ Berlin West Wustermark</td>
</tr>
<tr>
<td>18</td>
<td>Cargo Center Graz</td>
</tr>
<tr>
<td>19</td>
<td>GVZ Südwestsachsen</td>
</tr>
<tr>
<td>20</td>
<td>DIRFT Daventry</td>
</tr>
</tbody>
</table>

Source: Own figure

One of the most important locations of European combined transport is the “Interporto Verona” which is ranked again in first position.
The German Freight Villages in Bremen and Nürnberg could strengthen their positions in 2nd and 3rd place as well.

Besides the again good positioned locations, the Freight Village Berlin Süd Großbeeren can be seen as the “real champion” of this ranking. In the last ranking the location started in 10th place. In the current ranking it was able to improve and got ranked in 4th place.

The good positions of the German freight villages illustrate that these locations could strengthen and expand their positions compared with the national and European Ranking of the DGG. Important to notice is the high number of employees in the German freight villages. One reason for this is the fact that a lot of value is generated through the Value Added Services which affects the employment level. For example the FV Berlin Süd Großbeeren increased the employment rate by more than 70% in comparison to 2010. The Freight Village Bremen takes the lead of Freight Villages in Germany with a current number of employees of about 8,000.

Another notable location is the freight village Leipzig which improved and got ranked within the “Top 10”. The improvement is among other things a result in employment. In addition the location has realized a high number of measurements in the field of “Green Logistics”.

The outstanding success of German Freight Villages is furthermore justified through the high level of development as well as a high level of terminal capacity. Also the locations indicate a remarkable market share of the total supply of real estates in the region.
The Italian “Interporti” (Italian name of freight villages) are evaluated excellent as well. Seven locations out of the TOP 20 are from Italy. This success is not least because of the high qualified organizational structure of the freight village. A comparison of Italian sponsorships shows a high level of tasks by an extensive service facility. In total the Italian logistic locations have a high terminal capacity as well as a high utilization. A high share of combined transport is concentrated in the north of Italy. The Interporti in this region operate as important gateways for the trans-Alpine traffic.

In the undisputed first place is the Interporto Verona as in 2010. One main fact is the high number of 13,000 employees which shows the pioneer role in the whole European FV Ranking.

Furthermore the Spanish locations are positioned well, too. The PLAZA Logistica Zaragoza for example reached 5th place. This was primarily due to the intensive use of the airfreight interface directly established within the FV: There, the global logistics processes of the textile manufacturer Inditex are concentrated - among other things, responsible for the also in Germany very successful fashion brand Zara.

The establishment of the “Freight Village idea” is proceeding noticeably also in the East European countries. So two locations from Poland - CLIP in Poznan - and from Hungary - BILK in Budapest - could improve and reached the “Top 20” as well.

In addition to Germany, Italy, Spain and East Europe, also Delta 3 Dourges (France), Cargo Center Graz (Austria) and DIRFT Daventry (UK) found places in the lower range of the ranking.
The following shows a comparison of the average European assessments of the stage of development of the ranking 2010 and 2015. A significant positive trend, especially in the assessment of the level of development of the own FV (+1.2) can be seen.

![Diagram showing the stage of development comparison between 2010 and 2015.](source: own figure)

The following list gives an overview of the most important findings:

- Compared to the first European ranking in 2010, there is no change in 2015 among the TOP 3: Interporto Verona, GVZ Bremen and GVZ Nürnberg.

- Beside the German GVZ the Italian Interporti are the leading locations in Europe and therefore represent the international performance standards.

- Spain is one of the pioneers of successful establishment of the Freight Villages idea. But also in East Europe (Hungary and Poland) the formation achieved success.

- By contrast with the ranking 2010, the stage of development, not only in whole Europe, but also in the single countries and Freight Villages has increased noticeable.