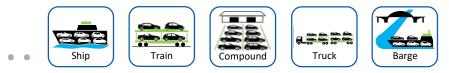


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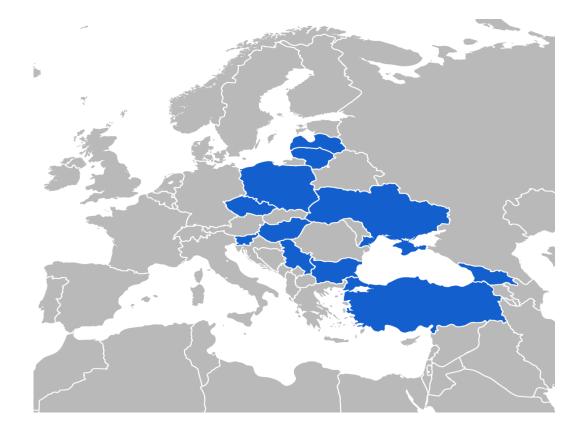
Eastern Regional Meetings

Krzysztof Dakowicz



Eastern region





	Country	Number of ECG members
1.	Bulgaria	1
2.	Czech Republic	1
3.	Hungary	1
4.	Latvia	2
5.	Lithuania	5
6.	Poland	3
7.	Serbia	1
8.	Slovenia	1
9.	Turkey	3
10.	Ukraine	1
	Total	19

Two meetings a year for the past nine years.



Summary of activity

No.	Place	Date	No. of guests	Local Supprort
1	Sofia	25.09.2014	35	SPED'S
2	Koper	23.04.2015	43	AvtaTransporti Kastelec
3	Istanbul	17.09.2015	50	AKANSEL Me-par & ILCE
4	Gdańsk	23.04.2016	47	BLG MOSTVA A ADAMPOL SA
5	Kyiv	22.09.2016	42	AVTO LOCISTIKA
6	Vilnius	20.04.2017	56	MANVESTA 2 YEARS OF SMART LOGISTICS
7	Warsaw	21.09.2017	49	QUALITY LOGISTICS
8	Zagreb	19.04.2018	40	Lagermax

Summary of activity

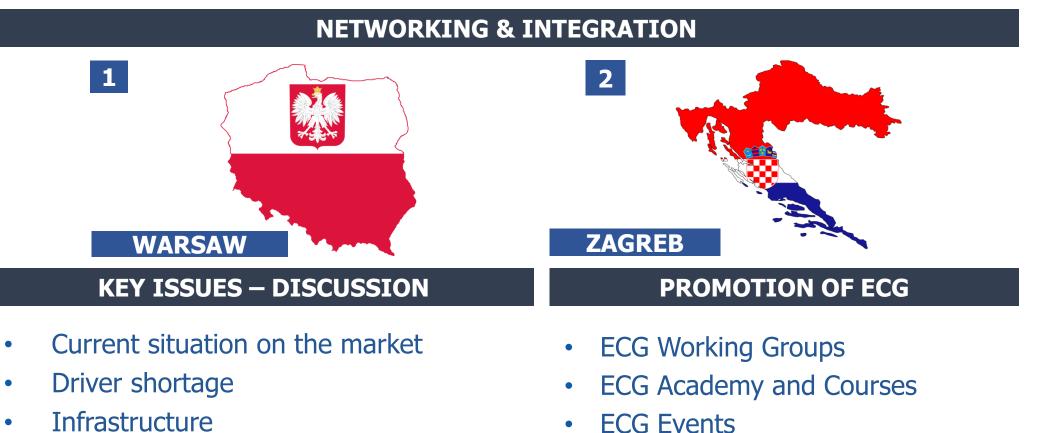


Compound

Truck

Barge

Train



- Infrastructure
- Cabotage

Current State of the Markets



Eastern EU markets with a peak in 2017 (sales figures since mid 2000s)

• PL, CZ, SK, SLO, LT markets peaked in 2017 with a total increase of 63% since 2013 Five consecutive years of growth from 2013 to 2017

Eastern EU markets below their peaks in mid 2000s

• H, R, HR, BG, EST, LV markets grew steadily for five consecutive years from 2013 to 2017, but the average numbers still have not yet reached half of the levels from a decade ago

Non-EU Eastern European markets

- In 2017 the Russian market started to recover showing year to year increase of almost 12%, with a very promising estimation of 1.9 m units to be sold in 2018 (growth of over 18%)
- Ukrainian sales increased by 74%, i.e. nearly 90k sold units, in 2017 since 2015 but that's still only 13% of the peak level of 2008
- In 2016 the Turkish market peaked at a record number of 983k sold units. A small decrease of 3% was observed in 2017.





Truck

Current State of the Markets





Infrastructure



Cabotage – various interpretations







Train



Future meetings – Budapest, Hungary





Focus of the future meetings

- Discussion about the current situation on the market
- Current key issues: minimum wages, shortage of drivers, limited number of car parks
- Road transport related topics





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Thank you for your attention!

Questions?

