*Artur Zimny, PhD, Karina Zawieja-Żurowska, PhD*

# "Blue Banana" or Central and Eastern Europe? The Development of European Logistics Hubs

*Professional paper*

*UDC 658.78(4)(047.31)*

*KEY WORDS: logistics, European logistics hubs, Western Europe, Central and Eastern Europe (CEE)*

*ABSTRACT - The most important results of surveys and analyses of the European logistics market conducted during last three years were presented in the article. The research concerning the field was carried out by three international consulting firms, i.e. Colliers International, Prologis and Knight Frank and then published in the corresponding reports. The information obtained is really crucial as it can be helpful in the process of taking rational decisions with regard to investment or development for the enterprises operating on the European market. According to the reports, the best logistics locations are mainly in the area called "Blue Banana" or "Bluemerang" - a corridor in the shape of a banana, which stretches from England in the north, through Belgium, the Netherlands, west part of Germany, and Switzerland, to Italy in the south. Nevertheless, in recent years the interest in Central and Eastern European States countries has been constantly increasing, as the countries located in that area have started to play more and more important role in the European logistics network.*

*Strokovni članek*

*UDK 658.78(4)(047.31)*

*KLJUČNE BESEDE: logistika, evropska logistična središča, Zahodna Evropa, Osrednja in Vzhodna Evropa (CEE)*

*POVZETEK - V članku so predstavljeni najpomembnejši rezultati raziskav in analiz evropskega logističnega trga v zadnjih treh letih. Raziskavo omenjenega področja so izvedla tri mednarodna svetovalna podjetja, Colliers International, Prologis in Knight Frank ter jih objavila v svojih poročilih. Pridobljene informacije so resnično ključne, saj so lahko zelo uporabne v procesih racionalnega odločanja glede vlaganj in razvoja podjetij, dejavnih na evropskem trgu. Kot pravijo poročila, najboljše logistične lokacije se v glavnem nahajajo v območju, imenovanem »Blue Banana« (modra banana) oz. »Blumerang« - koridor v obliki banane, ki se razteza od Anglije na severu, skozi Belgijo, Nizozemsko in zahodni del Nemčije, do Švice ter Italije na jugu. Nenazadnje, v zadnjih letih nenehno narašča interes za območja v Srednji in Vzhodni Evropi, kar pomeni, da so države v teh področjih pričele dobivati vedno večjo vlogo v evropski logistični mreži.*

## 1 Introduction

Over the last few years, the role of logistics in economic processes has been constantly growing. In 2007, the logistics sector in Europe accounted for nearly 14% of GDP and the dynamics growth of this sector has recently been higher than the dynamics growth of economies of the EU Member States (Freight Transport …, 2007, p. 2). Undoubtedly, there a few factors that have contributed to and had a significant impact on the fast development of logistics and among others the following should be mentioned: the enlargement of the European Union, steady improvement of transport infrastructure, mass consumption and growth of e-commerce (Liberadzki, 2006; Mindura, 2012). In the coming years, it can be expected that the competition within the sector will increase due to the further development of package delivery systems that will require the development of more concentrated logistics hubs and warehouses with high capacity located near the largest urban areas (Rynek magazynowy i przemysłowy, 2014).

The aim of this article is to present the most crucial results of research and analyses of the European logistics market, which were conducted during the last three years by three international consulting firms, i.e. Colliers International, Prologis and Knight Frank, and then published in the corresponding reports. In these reports, the current logistics attractiveness rankings of countries, regions and cities were presented and the attempt was made to depict the trends with regard to logistics hubs development in Europe. The information obtained from the aforementioned elaborations is crucial, as it can be helpful for the enterprises operating on the European market in the process of taking rational decisions with regard to investment or development.

It is worth signalling here that the access to the information concerning the European logistics market has improved over the last few years (not a long time ago, in 2006, the European Commission stated in its Communication that it is difficult to obtain a credible picture of the logistics market in Europe because the corresponding statistical data are currently insufficient (Freight Transport …, 2006). For example, an interesting survey comparing 160 countries in the world with regard to logistics services development has been conducted for a few years by the World Bank, which publishes the so-called LPI – Logistics Performance Index. The research was carried out based on the information obtained from a survey targeted at logistics companies operating in different states and, moreover, complemented by an appropriate statistical and market data. The general value of the Logistics Performance Index is for each country a weighted mean, which takes six components into account: the efficiency of customs and border management clearance, the quality of trade and transport infrastructure, the ease of arranging shipments, the competence and quality of logistics services, the ability to track and trace consignments, timeliness. The results of the research conducted in 2014 indicate that the leader, both in Europe and in the world, is Germany. In the ranking Germany is followed by the Netherlands, Belgium, Great Britain, Sweden, Norway and Luxemburg and the last in top ten there are Ireland, France and Switzerland. Due to a limited character of this article, a broader presentation of the aforementioned research has been skipped, as the research is very sophisticated and methodologically extensive (Connecting to Compete 2014).

## 2 Development of Logistics Hubs in the Light of Research and Analyses Conducted by Colliers International

The results of surveys and analyses conducted by Colliers International were published in the second quarter of 2013 in the report "Top European Logistics Hubs". The research covered 40 European cities, which were analysed with regard to six factors and each of the dimensions was built on the basis of appropriate variables whose values were obtained from the official statistical sources, particularly from the World Bank, Eurostat and Central Statistical Offices of certain countries (Table 1).

Therefore, the analysis carried by Colliers International was mostly based on "hard" quantitative data (statistical data).

*Table 1*: Dimensions and logistics variables used in the analysis conducted by Colliers International

| *Dimension (symbol)* | *Variable* | *Description of the variable* |
|---|---|---|
| Infrastructure and Accessibility (I&A) | Quality of infrastructure | The quality of combined trade and transport related infrastructure (seaports, airports, railway, roads etc.), calculated based on the value of 'Infrastructure' component taken into account while computing Logistics Performance Index (LPI) by the World Bank. |
| | Air freight capacity of airports | Total annual freight volume handled by all the airports reachable within 1-hour drive time from the city in question (assuming a speed of 80/km/h). |
| | Container capacity of seaports | Total volume of containers traffic handled by all seaports reachable within 1-hour drive time from the city in question (assuming a speed of 80/km/h). |
| | Rail accessibility | Degree of accessibility by rail and specifically whether each of the hubs considered is on a rail freight corridor. |
| Market Access (MA) | The size of population | Total population reachable in 2012 within a 9-hour drive time, at a speed of 80 km/h, from the city/region in question (nine hours is the daily maximum permissible drive time for a lorry-driver under the provisions of the European legislation). |
| | Value of GDP in 2012 | Total annual nominal GDP for 2012 enclosed within the area reachable within a 9-hour drive time, at a speed of 80km/h. |
| | Value of GDP in 2017 | Projected total nominal GDP in 2017 contained within the 9-hour catchment, at a speed of 80 km/h. |
| Operational Base Costs (OC) | Labour costs | Total annual direct remuneration in euro for employees working in the "Transport & Storage" sector. |
| | Rental costs | Top open-market tier of rent that could be expected for unit larger than 10,000 sq. m designed for logistics and distribution purposes, of the highest quality and specification in the best location in the market. |
| | Land costs | Top price payable for a sq. m of land for logistics/industrial use, in the best location, excluding taxes and any other extra charges. |
| Labour Market Capacity (LMC) | Workforce | Total volume of the workforce - in million - reachable within 1-hour drive time from the considered city, assuming a speed of 80 km/h. |
| | Unemployment | Total volume of people unemployed within the 1-hour catchment from the considered city, assuming a speed of 80 km/h. |
| Logistics Competence (LC) | Labour market specialisation | The portion of people employed in the "Transport & Storage" sector in the workforce total, in %. |
| | Logistics competence | The competence and quality of logistics services (e.g. transport operators, custom brokers). It is based on the "Logistics competence" component of the Logistics Performance Index 2012 compiled by the World Bank. |
| Business Environment (BE) | Ease of doing business | Index created by the World Bank measuring various aspects of a country's regulatory environment. These include, among others, the easiness to register a new business and enforcing contracts and the degree of investor protection. |

*Source*: Own elaboration on the basis: Top European Logistics Hubs. Colliers International, 2015.

In the described report, the relative logistics attractiveness of examined cities was analysed, according to three main scenarios, which applied a different weighting per category, namely:

- "balanced" scenario (I&A – 20%, MA – 20%, OC – 20%, LMC – 15%, LC – 15%, BE – 10%),
- "distribution" scenario (I&A – 25%, MA – 45%, OC – 15%, LMC – 5%, LC – 5%, BE – 5%),
- "manufacturing" scenario (I&A – 15%, MA – 10%, OC – 45%, LMC – 15%, LC – 5%, BE – 10%).

In the light of the "balanced" scenario,in the situation, where the decisions by enterprises were determined to a similar extent by costs, accessibility and the size of labour market, the unquestionable leaders of logistics attractiveness would be German, Belgian and Dutch cities (Table 2). These areas, being large sales markets, undoubtedly have an excellent infrastructure, qualified personnel, favourable business climate and, moreover, they take advantage of proximity to main European seaports and airports. On the other hand, it should be pointed out that operational costs, in particular labour and rental costs there, are relatively high.

For the enterprises, which are involved in distribution activities, the key importance is proximity to final consumers and developed transport infrastructure network, which enables to deliver the goods fast. That is why in the "distribution" scenario a higher weighting was assigned to first two dimensions i.e. the infrastructure & accessibility and the market access. The results of this scenario are similar to the results of the "balanced" scenario and they above all embrace the cities concentrated in the area called "Blue Banana" (Table 2) so a corridor, which stretches from England in the north, through Belgium, the Netherlands, west part of Germany and Switzerland, to Northern Italy in the south. This is the most densely populated, urbanized and the wealthiest region in Europe, thus the best choice for companies wanting to reach the largest number of customers as fast as possible (for example, 143 million customers are reachable in 9-hours from Antwerp, 154 million from Liege, 163 million from Düsseldorf and 190 million form Frankfurt). The cities located in that area take advantage of proximity to the biggest seaports and airports in Europe, which are involved in freight transport. They function like gateways towards non-EU markets through which quite many goods enter the European continent transit. It is worth mentioning here that in this scenario there are two cities with a high score, which are not located in the aforementioned area called "Blue Banana", namely Prague and Bratislava. Their attractiveness stems from the fact that a lot of customers are reachable in 9-hours (156 million customers are reachable from Prague and 119 million people from Bratislava), and relatively low labour and real estate costs.

The paramount factors for the companies active in distribution-related activities are proximity to consumers and presence of well-developed and reliable infrastructure network. In case of enterprises involved in the manufacturing sector, low costs of doing business are the most important determinants taken into consideration in decisions on locations. It is confirmed by numerous cases when companies move their production from countries with high labour costs to countries where these costs are much lower. That is why a higher weighting was given to the operational base costs within the “manufacturing” scenario. The results of the analyses with regard to the logistics appeal indicate a shift eastward, which in the ranking is illustrated by the high positions of the cities located in Central and Eastern Europe, but also in Ukraine and Russia. However, it should be emphasized here that the presented ranking was prepared in the second quarter of 2013, so before the events which took place at the turn of 2013 and 2014 in Ukraine and before the beginning of the Russian-Ukrainian conflict that resulted in imposing international sanctions on Russia. It is almost certain that if the ranking of the most attractive locations was created currently, i.e. at the beginning of 2015, the place of Kiev and Moscow would be low on the rank or they would not appear in the prepared table at all (Table 2). The competitive advantage of these areas, in particular Kiev, mostly stem from lower costs with regard to remuneration per worker in the transportation and warehousing sector, compared to the cost of labour in countries of Western Europe, and lower industrial land values. The attention should be paid to a high spot of Istanbul in the ranking, which except for relatively low labour costs, distinguishes itself by a good level of infrastructure, which is systematically improved. There are other reasons for such a high position, namely it can be connected with the construction of a third bridge connecting Europe and Asia, building a new airport, and a range of various investment projects financed by the government, which are aimed at increasing the industrial and warehousing potential capacity of the city. Nevertheless, Istanbul itself cannot take credit for the growing role of Turkey in the supply chain. Izmir and a new container port nearby (the 6th largest in Europe) are of crucial importance. Bratislava owes its high position in the ranking to the location near a global automotive centre (the production of cars increased in Slovakia from 42 thousand in 1997 to 925 thousand in 2012). Unfortunately, even in the “manufacturing” scenario the Polish cities do not take top positions due to relatively high labour costs in comparison to other countries of Central and Eastern Europe.

*Table 2*: The ranking of cities logistics appeal in the light of surveys and analyses conducted by Colliers International

| *Position* | *Balanced scenario* | *Distribution scenario* | *Manufacturing scenario* |
|---|---|---|---|
| 1 | Düsseldorf | Antwerp | Kiev |
| 2 | Antwerp | Rotterdam | Istanbul |
| 3 | Rotterdam | Düsseldorf | Bratislava |
| 4 | Brussels | Brussels | Upper Silesia |
| 5 | Hamburg | Hamburg | Sofia |
| 6 | Venlo | Amsterdam | Antwerp |
| 7 | Amsterdam | Liège | Lille |
| 8 | Lille | Venlo | Budapest |
| 9 | Paris | Lille | Düsseldorf |
| 10 | Liège | Frankfurt | Prague |

| | | | |
|---|---|---|---|
| 11 | Istanbul | Paris | Venlo |
| 12 | Frankfurt | Munich | Izmir |
| 13 | Milan | Lyon | Poznań |
| 14 | Bratislava | Prague | Liège |
| 15 | Prague | Milan | Moscow |
| 16 | Munich | Le Havre | Bucharest |
| 17 | Lyon | Bratislava | Brussels |
| 18 | Upper Silesia | Rijeka/Koper | Hamburg |
| 19 | Budapest | Bologna | Belgrade |
| 20 | Barcelona | Istanbul | Warsaw |

*Source*: Own elaboration based on: Top European Logistics Hubs. Colliers International, 2015.

All in all, according to the authors of the "Top European Logistics Hubs" report, most of the analysed cities have certain strengths and advantages over others. Identifying them largely depends on enterprises' expectations while taking location decisions. Western Europe is a perfect place for companies involved in distribution-related activities and advanced manufacturing. The cities of Eastern and Central Europe are best suited to both distribution and manufacturing companies. Hubs situated in South Eastern Europe, Eastern Europe and Turkey are quite good locations for lower-cost production of goods, which are not demanded immediately, and the goods for local markets. The least attractive cities from the logistics point of view are the ones located in the Southern Europe, with the peripheral economies without competitive advantage regarding costs, infrastructure or market potential over other regions. Key logistics locations in Europe in the light of research and analyses conducted by Colliers International are presented in Figure 1.

*Figure 1*: Key logistics locations in Europe in the light of surveys and analyses conducted by Colliers International


*Source*: Top European Logistics Hubs. Colliers International, p. 4, Retrieved on 2/15/2015 from the Internet: http://www.colliers.com/en-gb/emea/insights/top-european-logistics-hubs#.VJ8JqcKwCI.

## 3 Development of Logistics Hubs in the Light of Surveys and Analyses Conducted by Prologis

The results of research and analyses carried out by Prologis were published in the third quarter of 2013 in the “Europe’s Most Desirable Logistics Locations. Logistics Facility User Survey 2013” report. The research included 160 warehouse users from various sectors, who were asked to express their opinions in the surveys by ranking 100 logistics locations in Europe according to 13 criteria divided into four categories (Table 3). It should be emphasized that besides assessing the stated locations, the respondents were asked to attribute an appropriate weighting to particular criteria taken into consideration while choosing a location (using a scale from 1 – minimum to 5 – maximum). Generally speaking, in respondents’ views the most important logistics criteria are: proximity to economic networks and strategic transportation access, proximity to customers and labour availability and flexibility. Nevertheless, there are some differences between weights ascribed by particular groups of respondents. For logistics operators, the most crucial factors are real estate prices and proximity to suppliers and customers, but for freight forwarders/shippers, proximity and quality of road access and regulations are of key importance. Therefore, the analysis of Prologis was based on the “soft” qualitative data (respondents’ opinions).

*Table 3*: Logistics categories and criteria used in the analysis conducted by Prologis

| *Category* | *Criterion* | *Weights ascribed by respondents to particular criteria (from 1 to 5)* |
|---|---|---|
| Proximity to customers and suppliers | Proximity to Customers | 3,34 |
| | Proximity to Suppliers | 3,90 |
| Labour and Government | Labour availability and flexibility: | 3,83 |
| | Wages and benefits | 3,64 |
| | Regulatory | 3,53 |
| | Incentives | 3,22 |
| Real Estate | Real estate costs | 3,80 |
| | Availability of existing modern warehouses | 3,63 |
| | Availability of land | 2,75 |
| Infrastructure | Proximity to economic networks and strategic transportation access | 4,06 |
| | Proximity and quality of road access | 3,73 |
| | Transportation costs | 3,35 |
| | Proximity to different types of modality | 2,60 |

*Source*: Own elaboration based on: Europe’s Most Desirable Logistics Locations. Logistics Facility User Survey 2013. Prologis.

The obtained results unambiguously and clearly indicate that the top three locations in respect of logistics attractiveness take Dutch and Belgian cities followed by – with two exceptions – German and French regions (Table 4). Frankfurt, Prague, Amsterdam and Central Poland poll outside the top ten, but they are still in the first quartile in terms of best locations in the respondents' opinion. The second quartile includes particularly Munich, Hamburg, Central East England, Warsaw and Upper Silesia and the third - Stuttgart, West England and Wales. The cities and regions from the fourth quartile are situated in the peripheral areas of Europe and do not play a crucial role in the European logistics network.

Similar conclusions with regard to logistics attractiveness can be drawn while analysing three top locations of countries against particular categories. Taking into account proximity to customers and suppliers, Germany is at the top, which undoubtedly stems from the location of the country in the central part of Europe. The Netherlands scores highest for the labour availability and regulatory provisions and that is why it is perceived as the gateway to Europe with low regulation barriers. Simultaneously, the Netherlands is the most desirable logistics location in terms of land availability and modern warehouses, although the real estate prices are significantly higher than the European average. As far as the infrastructure is concerned, the most preferred country is Germany (Table 4). Some further interesting conclusions can be drawn while analysing the results of the survey according to industry groups. Retail companies most often prefer locations in Great Britain, pharmaceutical companies choose Switzerland, and Hi-Tech and logistics operators are mostly interested in the locations in the Netherlands.

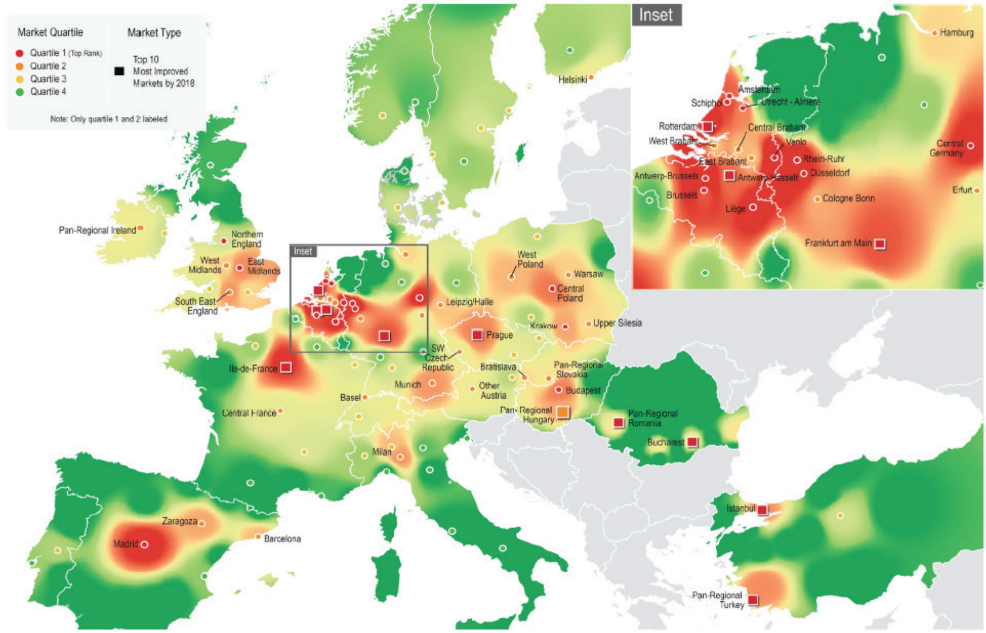
*Table 4*: The rankings of logistics attractiveness of countries, regions and cities in the light of research and analyses conducted by Prologis

| *Position* | *Total* | *Category* | | | |
|---|---|---|---|---|---|
| | | *Proximity to suppliers and customers* | *Labour and government* | *Real Estate* | *Infrastructure* |
| 1 | Venlo | Germany | The Netherlands | The Netherlands | Germany |
| 2 | Antwerp-Brussels | The Netherlands | Eastern European Countries | Germany | The Netherlands |
| 3 | Rotterdam | Belgium | Belgium | Belgium | Belgium |
| 4 | Rheine-Ruhr | France | Poland | Poland | France |
| 5 | Madrid | Great Britain | Romania | Romania | Eastern European Countries |
| 6 | Liège | Poland | Great Britain | Eastern European Countries | Great Britain |
| 7 | Central Germany | Spain | Spain | Great Britain | Spain |
| 8 | Pan-Regional Romania | Eastern European Countries | Germany | Spain | Poland |
| 9 | Île-de-France | Central European Countries | Turkey | Czech Republic | Turkey |
| 10 | Düsseldorf | Czech Republic | Central European Countries | France | Romania |

*Source*: Own elaboration based on: Europe's Most Desirable Logistics Locations. Logistics Facility User Survey 2013. Prologis.

To conclude, the results of the survey conducted by Prologis among warehouse users allow to state that the best European logistics locations – despite increasing importance of countries of Central and Eastern Europe in the logistics network – are mostly situated in the area called the "Blue Banana". Key logistics locations in Europe in the light of surveys and analyses conducted by Prologis are presented in Figure 2.

*Figure 2*: Key logistics locations in Europe in the light of research and analyses conducted by Prologis




*Source*: Europe's Most Desirable Logistics Locations. Logistics Facility User Survey 2013. Prologis, p. 2.

## 4 The Development of Logistics Hubs in the Light of Surveys and Analyses Conducted by Knight Frank

The results of research and analyses conducted by a company called Knight Frank were published in 2014 in the report entitled "European Logistics & Industrial Market Report 2014". The surveys were carried out in order to prepare a market overview regarding the current situation and the trends on the European logistics and industrial market, particularly the value of the biggest investments and the level of rents in the desirable areas. Therefore, the analysis was fully based on „hard" statistical quantitative data (market data).

The market overview shows that in 2013, around 17.4 billion Euros was invested in the logistics and industrial market in Europe, which means that investment volumes in this sector increased by 33% compared with the previous year. Undoubtedly the boost to investment volumes in the logistics and warehouse market was led by two pan-European joint ventures formed in 2013 – a venture between Prologis and Norges Bank Investment Management and SEGRO and Canada's PSP Investments. The value of both investments was higher than 2 billion Euros. The three largest logistics investment markets in the analysed year were as follows: Great Britain, Germany and France, the countries that collectively saw 57% of European investments. Nevertheless, it should be mentioned here that the interest in these areas and in the whole Western Europe has decreased compared to the previous years and has been accompanied by growing focus on locations in Central and Eastern Europe. In 2013 logistics and industrial investments accounted for 16% in Central and Eastern Europe (16% of all logistics investments in Europe), which is nearly the same as in Germany only.

In observing the European logistics market and taking the level of prime rents in the best locations into consideration, it can be pointed out that in 2013 the highest ones were in London at Heathrow (near Heathrow Airport) and Zürich (160-170 euro/m$^2$/year). Slightly lower rents were expected by people renting logistics space in Stockholm, Helsinki and Moscow (110-120 euro/m$^2$/year) and in Amsterdam (near the airport Schiphol), Birmingham, Munich and Frankfurt (80-90 euro/m$^2$/year). In other European bigger cities, the rents for the best locations fluctuated between 50 and 80 euro/m$^2$/year.

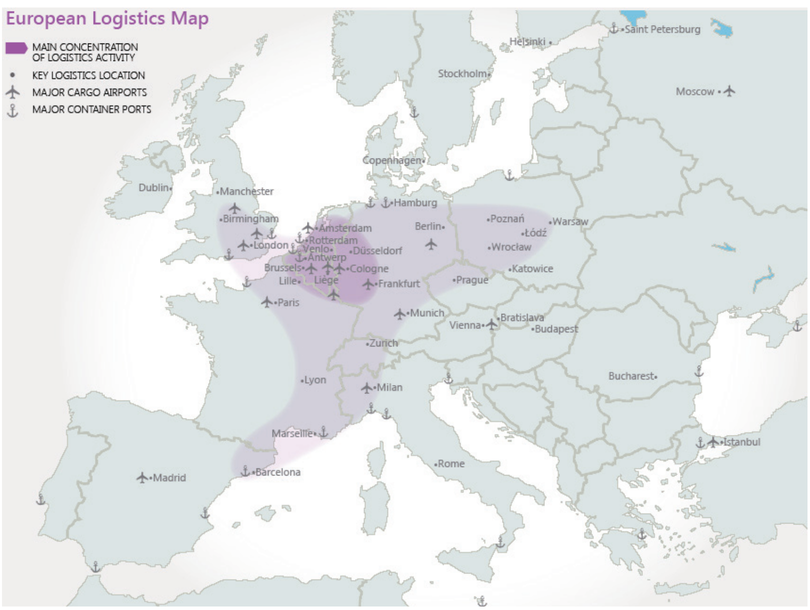
*Table 5:* The rankings of countries and cities logistics attractiveness in the light of surveys and analyses conducted by Knight Frank

| *Position* | *Criterion of logistics investment value* | *Criterion of logistics rent value in the most sought-after locations* |
|---|---|---|
| 1 | Great Britain | London (Heathrow) |
| 2 | Germany | Zürich |
| 3 | Central and Eastern European Countries | Stockholm |
| 4 | Scandinavian Countries | Helsinki |
| 5 | France | Moscow |
| 6 | Benelux Countries | Amsterdam (Schiphol) |

*Source:* Own elaboration based on: European Logistics & Industrial Market Report 2014. Knight Frank, 2015.

A more detailed and interesting picture of the European logistics market may be drawn after analysing the situations in particular countries. The Dutch market is undoubtedly quite diversified and polarized. On one hand, there is a shortage of high quality space in the most desirable areas, on the other hand, there is an excess of poorer quality vacant warehouses in less attractive locations. In Belgium, the demand for logistics space remains stable at quite a high level. Nevertheless, the developers are cautious and do not invest in new projects, which translates into shortages of available high quality space in most sought-after locations. Very little new space is offered on the logistics market in Romania and developers are not willing to commence new projects. Relatively high demand for space is observed in areas to the west of Bucharest. The Irish logistics market is characterized by a significant occupier demand along the so-called N7 corridor, situated southwest of Dublin. The companies started to consider purchasing available industrial buildings, as it seems to be a cheaper solution than designing and building new projects. Demand for warehouse space in Germany is high due to companies involved in e-commerce. In the key locations, the availability of space is really limited. In Spain, after a few weak years the occupier activity is steadily increasing – especially for the fashion and pharmaceutical companies and online retailers. The strongest demand is noted in Madrid and north east to it. In the UK, shortage of high quality new space is really severe. Recently a range of large logistics investments has taken place in England. In Russia, the logistics market is limited solely to Moscow and the area around. Significant demand causes that vacancy rates are kept at low levels. Nevertheless, most of new development projects are commenced solely on a speculative basis. In France, the activity in the described sector has been rather subdued in recent years, although a few large investments have been made in the Marseille and Lille markets. The automotive industry has a crucial impact on functioning of the logistics market in the Czech Republic. Moreover, the market development will be boosted by building two large new distribution centres by Amazon near Prague and Brno. The Austrian market is characterized by a stable and moderate demand for logistics space. The locations around the cities Vienna and Graz are relatively inexpensive. The interest in space in Poland is relatively the highest in Warsaw, Lower and Upper Silesia, Greater Poland (Wielkopolska Region) and near Łódź, so the regions with best road connections. The key logistics locations in Europe in the light of surveys and analyses conducted by Knight Frank are presented in Figure 3.

*Figure 3*: Key logistics locations in the light of research and analyses conducted by Knight Frank




*Source*: European Logistics & Industrial Market Report 2014. Knight Frank, p. 3.

## 5 Conclusion

The results of international surveys and analyses allow us to sum up, that the most attractive logistics locations are situated in the area called the "Blue Banana", corridor in the shape of a banana, which stretches from England in the north, through Belgium, the Netherlands, west part of Germany, and Switzerland, to Italy in the south.. In recent years, interest in countries of Central and Eastern Europe has been steadily increasing and these countries are gaining more and more important role in the European logistics network. It was also confirmed by the results of the latest research and analyses conducted by the authors with regard to regions located in Central and Eastern Europe. According to the findings, the logistics sector in the regions where there are the capital cities of particular countries located, especially the capitals of Estonia, Latvia, Poland, Slovakia and Hungary, has started to develop. Moreover, the described sector is quite well developed in the wealthier regions of Slovakia and Slovenia and in Bulgarian, Polish and Romanian regions with access to the sea, thus the regions with the seaports (Zawieja-Żurowska and Zimny, 2014). It must also be underlined that the level of branch development in regions of Central and Eastern Europe is positively correlated (statistically significant) with the economic development level of regions measured by GDP per capita against purchasing power parity.

Although the assessments of logistics attractiveness presented in the aforementioned reports are undoubtedly transparent and credible, one should remember that final decisions regarding location of the business are more complex and also depend on a range of many other factors, which were not considered in the presented research and analyses. Moreover, it may be expected that together with the development of rail freight transport, as being a more efficient and less burdensome for the environment being and an alternative for road transportation, logistics appeal of some countries, regions and cities will change and evolve in the future.

*Dr. Artur Zimny, dr. Karina Zawieja-Żurowska*

## »Modra banana« ali Osrednja in Vzhodna Evropa? Razvoj evropskih logističnih središč

*Cilj tega članka je predstaviti najbolj ključne rezultate raziskav in analiz evropskega logističnega trga, ki so bile izvedene v zadnjih treh letih treh v mednarodnih svetovalnih podjetij Colliers International, Prologis in Knight Frank in objavljene v ustreznih poročilih. Predstavili so aktualno razvrstitev držav, regij in mest glede na priljubljenost v logističnem smislu in poskušali prikazati trende razvoja logističnih središč v Evropi. Omenjene informacije so lahko resnično ključnega pomena, saj so izjemno koristne za podjetja, ki delujejo na evropskem trgu, za njihov proces racionalnega odločanja glede naložb in razvoja.*

*Rezultati raziskave in analize podjetja Colliers International so bili objavljeni v drugem četrtletju leta 2013 v poročilu »Top European Logistics Hubs« (Najboljša evropska logistična središča). Raziskava je zajemala 40 evropskih mest, analiziranih glede na šest dejavnikov in posamezna dimenzija je bila ustvarjena na podlagi ustrezne spremenljivke, katere vrednosti so bile pridobljene iz uradnih statističnih virov, zlasti iz Svetovne banke, Eurostata in Centralnih statističnih uradov nekaterih držav. Tako analiza podjetja Colliers International temelji na t.i. »grobih« kvantitativnih podatkih (statističnih podatkih). Po mnenju avtorjev poročila »Top European Logistics Hubs« (Najboljša evropska logistična središča) ima večina analiziranih mest določene prednosti pred drugimi. Razpoznavnost je v veliki meri odvisna od pričakovanja podjetij, ko se odločajo o lokaciji. Zahodna Evropa je kot nalašč za podjetja, vključena v dejavnosti distribucije in napredne proizvodnje. Mesta v Vzhodni in Srednji Evropi so primerna tako za distribucijo, kot za proizvodna podjetja. Središča, ki se nahajajo v Jugovzhodni Evropi, Vzhodne Evropi in Turčiji, so precej dobre lokacije za cenejše proizvodnje blaga, ki ni zahtevano takoj ter blaga za lokalne trge. Najmanj privlačna mesta iz logističnega vidika so tista, ki se nahajajo v Južni Evropi, kjer se nahajajo obrobna gospodarstva brez konkurenčne prednosti glede na stroške, infrastrukturo ali tržni potencial, pred drugimi regijami.*

*Rezultati raziskav in analiz, s strani podjetja Prologis so bili objavljeni v tretjem četrtletju leta 2013, v poročilu »Europe's Most Desirable Logistics Locations. Logistics Facility User Survey 2013«. Raziskava je zajemala 160 uporabnikov skladišč iz različnih sektorjev, ki so bili pozvani, da izrazijo svoje mnenje v anketi ter ranžirajo 100 logističnih središč v Evropi glede na 13 kriterijev, razdeljenih v 4 kategorije. Analiza podjetja Prologis je bila izpeljana na podlagi »fleksibilnih« kvalitativnih podatkov (mnenj anketirancev). Dobljeni rezultati nedvomno nakazujejo, da najboljše tri lokacije glede na priljubljenost posameznih mest v logističnem smislu zavzemajo nizozemska in belgijska mesta, sledijo jim (z dvema izjemama) nemške in francoske regije. Frankfurt, Praga, Amsterdam in osrednja Poljska so uvrščene izven najboljših deset, vendar pa so, po mnenju anketirancev, še vedno v prvi četrtini. Druga četrtina mest zajema München, Hamburg, osrednjo Vzhodno Anglijo, Varšavo in Zgornjo Šlezijo, tretja četrtina pa Stuttgart, Zahodno Anglijo in Wales. Mesta in regije v zadnji četrtini so locirana na perifernih območjih Evrope in ne igrajo pomembne vloge v Evropski logistični mreži. Rezultati raziskave podjetja Prologis narekujejo, da so najboljše evropske lokacije iz vidika logistike (kljub naraščajoči pomembnosti držav Osrednje in Vzhodne Evrope v logističnem omrežju) v večini locirane v območju, imenovanem »modra banana«.*

*Rezultati raziskave in analize podjetja Knight Frank so bile objavljeni leta 2014 v poročilu z naslovom: European Logistics & Industrial Market Report 2014. Raziskava je bila izvedena z namenom pripraviti aktualen pregled trga z vidika trenutne situacije in trendov evropske logistike ter proizvodnega trga, natančneje, vrednosti večjih investicij in višine najemnin v zaželenem prostoru. Analiza je tako temeljila na grobih statističnih kvantitativni podatkih (tržni podatki).*

*Bolj podroben in zanimiv podatek o Evropskem logističnem trgu se lahko poda po analizi situacije v določenih državah. Nizozemski trg je nedvomno zelo raznolik in polariziran. Na eni strani obstaja pomanjkanje visoke kakovosti prostorov v najbolj zaželenih območjih, na drugi strani pa imajo presežek prostih skladišč slabše kakovosti na manj privlačnih lokacijah. V Belgiji povpraševanje po logističnih prostora ostaja stabilno na zelo visoki ravni. Kljub temu, so razvijalci previdni in ne vlagajo v nove projekte, kar se kaže v pomanjkanju visoko kakovostnega prostora na najbolj iskanih lokacijah. Zelo malo novega prostora je na voljo na trgu logistike v Romuniji in razvijalci niso pripravljeni za začetek novih projektov. Relativno največje povpraševanje za prostor je opaziti v območjih zahodno od Bukarešte. Za irski logistični trg je značilno znatno povpraševanje v t.i. N7 koridorju, ki se nahaja jugozahodno od Dublina. Podjetja začnejo razmišljati o nakupu obstoječih industrijskih stavb, saj se zdi, da je to cenejša rešitev kot načrtovanje in gradnja novih projektov. Povpraševanje po skladiščnem prostoru v Nemčiji je visoko zaradi podjetij, ki se ukvarjajo z e-poslovanjem. Na ključnih lokacijah resnično gre za omejeno razpoložljivost prostora. Po nekaj letih slabega povpraševanja, v Španiji skladiščna dejavnost vztrajno narašča – zlasti aktivni so modna podjetja, farmacevtske družbe in spletni trgovci. Najmočnejši povpraševanje je v Madridu in severovzhodno od mesta. V Veliki Britaniji je res močno pomanjkanje visoko kakovost novih prostorov. Nedavna paleta velikih logističnih naložb je potekala prav v Angliji. Ruski trg logistike je omejen izključno na Moskvo in okolico. Veliko povpraševanje pa vseeno ohranja najemnine na nizki ravni. Kljub temu je treba poudariti, da se večina novih projektov razvoja zgolj omenja in ne nujno tudi realizira. V Franciji dejavnost v omenjenem sektorju v zadnjih letih skromno stagnira, čeprav je nekaj velikih naložb bilo narejenih na trgih Marseillesa in Lillea. Avtomobilska industrija ima ogromen vpliv na delovanje logističnega trga v Češki Republiki. Še več, razvoj trga bo napredoval z gradnjo dveh velikih novih distribucijskih centrov podjetja Amazon v bližini Prage in Brna. Avstrijski trg je značilno stabilen in ima zmerno povpraševanje po logističnem prostoru. Lokacije po mestih Dunaj in Gradec so relativno poceni. Zanimanje za prostor na Poljskem je največji na območju mesta Varšava, Spodnje in Zgornje Šlezije, Velike Poljske (Wielkopolska regija) in v bližini Łódźa, torej v regijah z najboljšimi cestnimi povezavami.*

*Rezultati mednarodnih raziskav in analiz omogočajo zaključek, da se aktualne države, regije in mesta, glede na priljubljenost v logističnem smislu nahajajo v območju, imenovanem modra banana (je koridor v obliki banane, ki se razteza od Anglije na severu, skozi Belgijo, Nizozemsko in zahodni del Nemčije, do Švice ter severnega dela Italije). V zadnjih letih zanimanje za države Srednje in Vzhodne Evrope stalno narašča in te države pridobivajo vedno bolj pomembno vlogo v evropskem logističnem omrežju. To so potrdili tudi rezultati najnovejših raziskav in analiz, ki jih navajajo avtorji. Med navedenimi je razvita logistika v regijah ob glavnih mestih Estonije, Latvije, Poljske, Slovaške in Madžarske. Prav tako je logistični sektor precej dobro razvit v bogatejših regijah Slovaške in Slovenije ter v bolgarskih, poljskih in romunskih regijah z dostopom do morja, torej v regijah s pristanišči (Zawieja-Żurowska in Zimny, 2014). Je pa potrebno poudariti, da je raven podružničnega razvoja v regijah*

*Centralne in Vzhodne Evrope pozitivno povezana (statistično pomembna) s stopnjo gospodarskega razvoja regij, merjeno z BDP na prebivalca v paritetah kupne moči.*

*Čeprav so ocene priljubljenosti lokacij v logističnem smislu predstavljene v omenjenih poročilih, nedvomno transparentne in verodostojne, se je potrebno zavedati, da so končne odločitve glede lokacije poslovanja kompleksnejše in odvisne tudi od vrste drugih dejavnikov, ki niso bili upoštevani v predstavljenih raziskavah in analizah. Še več, lahko se pričakuje, da se bo z razvojem železniškega tovornega prometa, kot bolj učinkovitega in manj obremenjujočega za okolje, priljubljenost nekaterih držav, mest ali regij v logističnem smislu spremenila in še nadalje razvijala v prihodnosti.*

## LITERATURE


1. Connecting to Compete 2014. Trade Logistics in the Global Economy. The Logistics Performance Index and Its Indicators. Washington: The World Bank. Retrieved on 18. 2. 2015 from the Internet: http://lpi.worldbank.org/sites/default/files/LPI_Report_2014.pdf.
2. Europe’s Most Desirable Logistics Locations. Logistics Facility User Survey 2013. Prologis. Retrieved on 15. 2. 2015 from the Internet: http://www.prologis.com/docs/Europes-Most-Desirable-Logistics-Locations.pdf.
3. European Logistics & Industrial Market Report 2014. Knight Frank. Retrieved on 15. 2. 2015 from the Internet: http://content.knightfrank.com/research/237/documents/en/2014-1775.pdf.
4. Freight Transport Logistics Action Plan (2007). The European Commission.
5. Freight Transport Logistics in Europe – the key to sustainable mobility (2006), Commission of the European Communities.
6. Liberadzki, B. (2006). Logistyka jako szansa wzrostu konkurencyjności Unii Europejskiej. Retrieved on 15. 2. 2015 from the Internet: http://www.logistyka.net.pl/bank-wiedzy/item/4378-logistyka-jako-szansa-wzrostu-konkurencyjnosci-unii-europejskiej.
7. Mindura, M. (2012). Zarys europejskiej polityki logistycznej. Retrieved on 15. 2. 2015 from the Internet: http://www.logistyka.net.pl/bank-wiedzy/item/7839-zarys-europejskiej-polityki-logistycznej.
8. Rynek magazynowy i przemysłowy 2014: 6 najważniejszych trendów. CBRE. Retrieved on 15. 2. 2015 from the Internet: http://i22.biura.pl/artykuly/2174/1396966776.pdf.
9. Top European Logistics Hubs. Colliers International. Retrieved on 15. 2. 2015 from the Internet: http://www.colliers.com/en-gb/emea/insights/top-european-logistics-hubs#.VJ8JqcKwCI.
10. Zawieja-Żurowska K. and Zimny A. (2014). Warehousing and support activities for transportation in Central and Eastern Europe – regional disproportions and development perspectives, Logistyka, No. 6.



*Artur Zimny, PhD, Dean of Faculty of Social Sciences and Humanities in Konin.*
*E-mail: artur_zimny@tlen.pl*

*Karina Zawieja-Żurowska, PhD, Head of Department of Political Studies and Internal Security in Konin.*
*E-mail: karinazurowska@wp.pl*