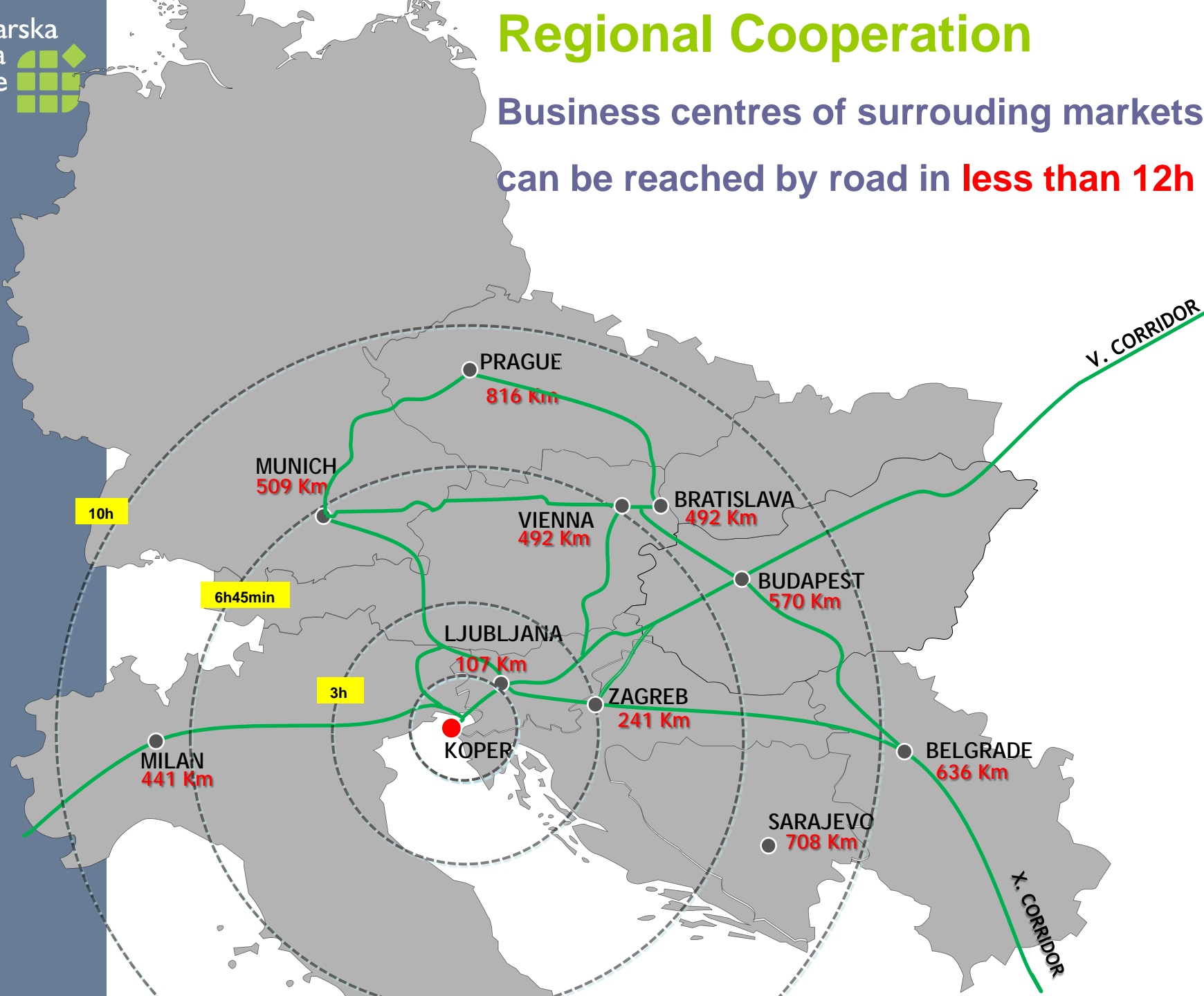


Slovenia your Logistic Gateway to Europe

Robert Sever
Transport association,
Chamber of Commerce and
Industry of Slovenia

Regional Cooperation

Business centres of surrounding markets
can be reached by road in **less than 12h**



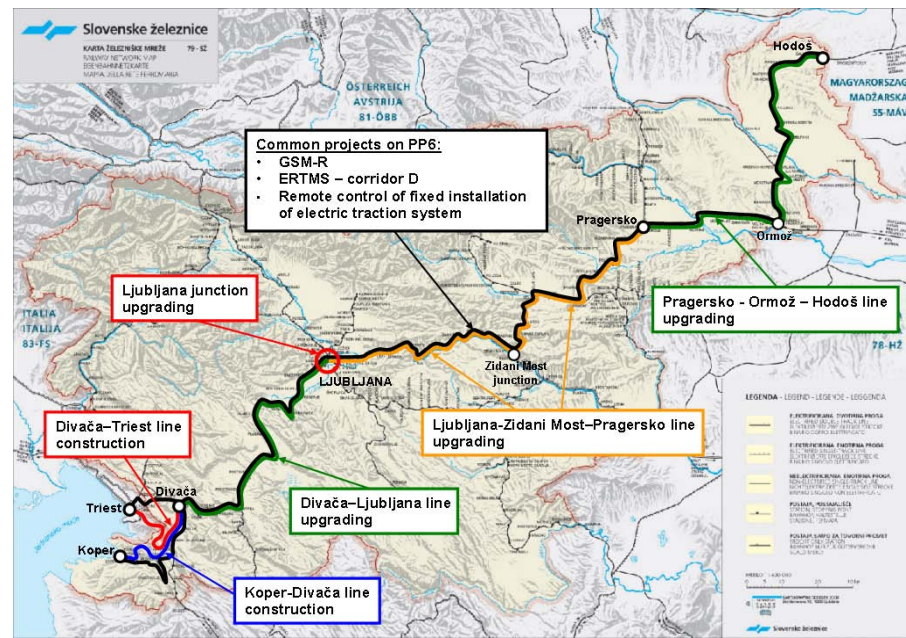
Main goals in field of infrastructure



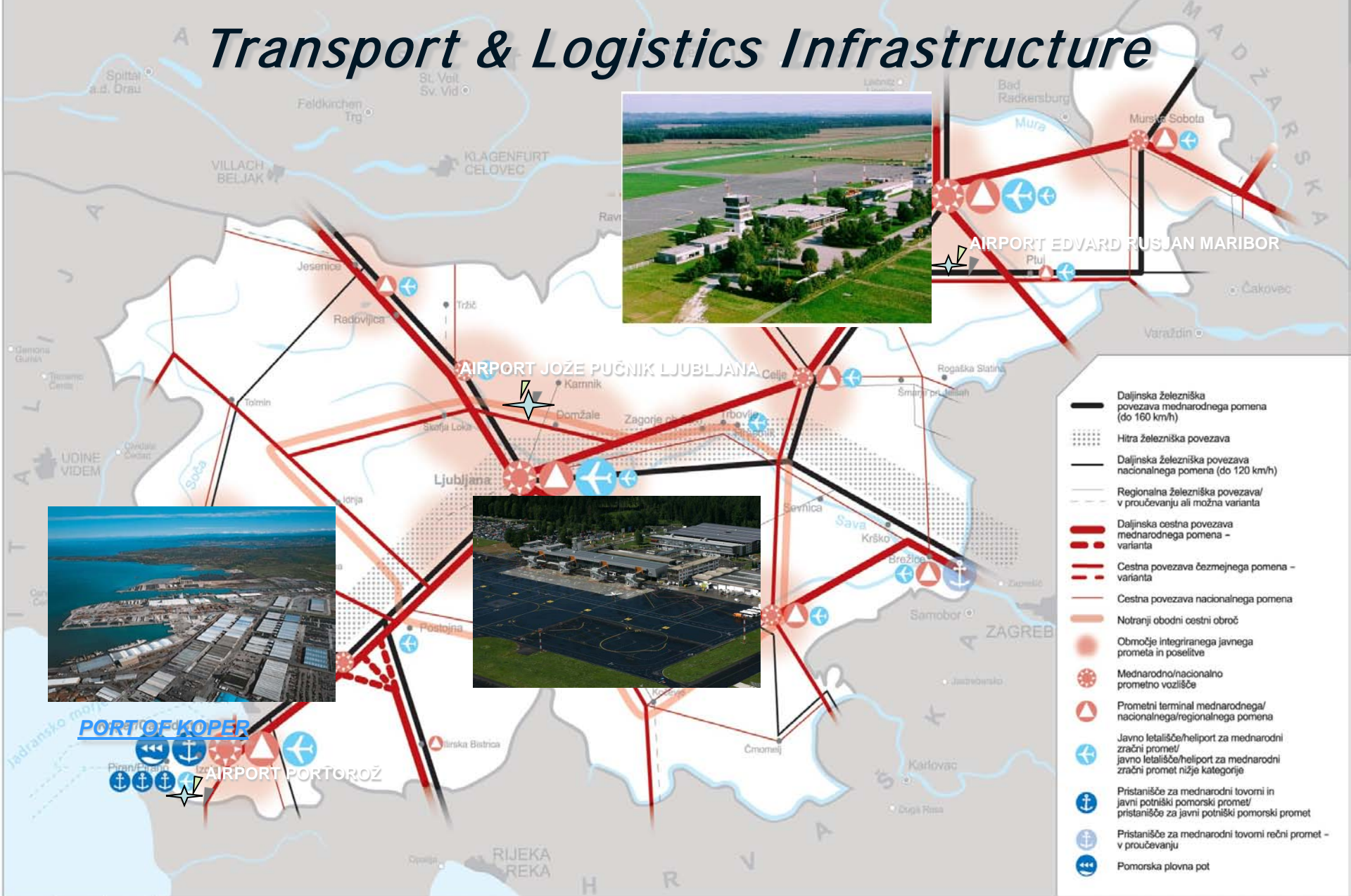
- Main strategic goals
- modernising the national roads network;
 - improving traffic safety;
 - development of intelligent transport systems;
 - introduction of an electronic road toll system.

Main strategic goals

- development of the efficient and modern public railway infrastructure;
- shifting of freight from roads to rails;
- multimodality;
- safe and efficient transport.



Transport & Logistics Infrastructure



Publikacijska karta št. 3 k poglavju III.2.1

Razvoj gospodarske javne infrastrukture

Usmeritve za razvoj prometnega sistema

Strategija prostorskega razvoja
Republike Slovenije

Meja na morju med RS in RH je prevzeta po pogodbi o skupni državni meji med RS in RH (priloga 1), ki sta jo 19.07.2001 potrdili obe vladi, 20.07.2001 pa je bila parafrazirana s strani vodij pogajalskih skupin.

Vir: Strokovne podlage SPRS

Kartografska podlaga: MOPE - UPP, MOPE - GURS, GZ, 2003
Kartografska obdelava: MOPE, julij 2004



Quality link to regional market

Well **established links with neighbouring countries**, specially with countries in Central and South Eastern Europe and countries of former Yugoslavia. Excellent road connections to hinterland markets with modern highway network

Hub for foreign companies to serve the Central European and South-east European markets

Advantages:

- Economic and political stability
- Knowledge of circumstances, language, culture, people
- Geographical location with well developed infrastructure and logistics potential
- Slovenia is an important investor in the SE Europe





Quality of workforce

- **Technologically - minded** (long logistics and industrial tradition), **innovative spirit**,
- **Highly educated**: 16% university degree, 62% secondary school,
- **Excellent IT & foreign language skills** (English, German, Italian, Serbo-Croatian ...),
- **Reliable workforce** with high ethical and moral values,
- **Stable business** environment.



Main trading partners - EXPORT I-XII 2011

	Country	mil. €	(%)
1.	Germany	3.165	19.7
2.	Italy	1.856	11.6
3.	France	1.361	8.5
4.	Austria	1.284	8.0
5.	Croatia	1.241	7.7
6.	Serbia	533	3.3
7.	Russian Federation	520	3.2
8.	Bosnia & Herzegovina	501	3.1
9.	Poland	468	2.9
10.	Hungary	459	2.9
	Σ TOP 10	11.388	70.9

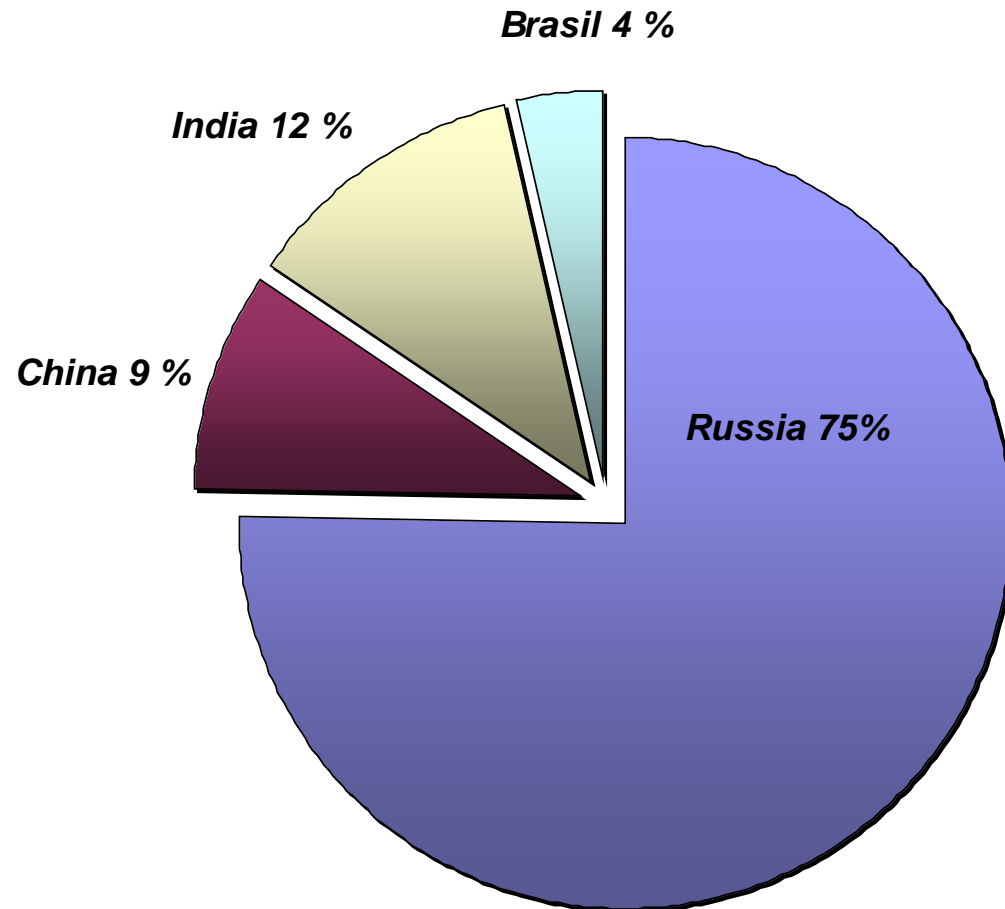
Main trading partners - IMPORT I-XII 2011

	Country	mil. €	(%)
1.	Germany	3.117	18.3
2.	Italy	3.009	17.6
3.	Austria	2.238	13.1
4.	France	943	5.5
5.	Hungary	645	3.8
6.	Croatia	630	3.7
7.	Netherland	565	3.3
8.	Spain	463	2.7
9.	Czech Republic	439	2.6
10.	Belgium	387	2.3
Σ TOP-10		12.436	72.9



Emerging markets and Slovenia

BRIC markets – 3.8 %



Source: Surs

Major foreign trade products in 2011

	Exports	Imports
1	Motor cars	Petroleum oils, oils from bituminous minerals
2	Pharmaceuticals	Motor cars
3	Parts and accessories of motor vehicles	Parts and accessories of motor vehicles
4	Electrical household appliances	Pharmaceuticals
5	Pumps and compressors	Petroleum gases

Source: SKEP

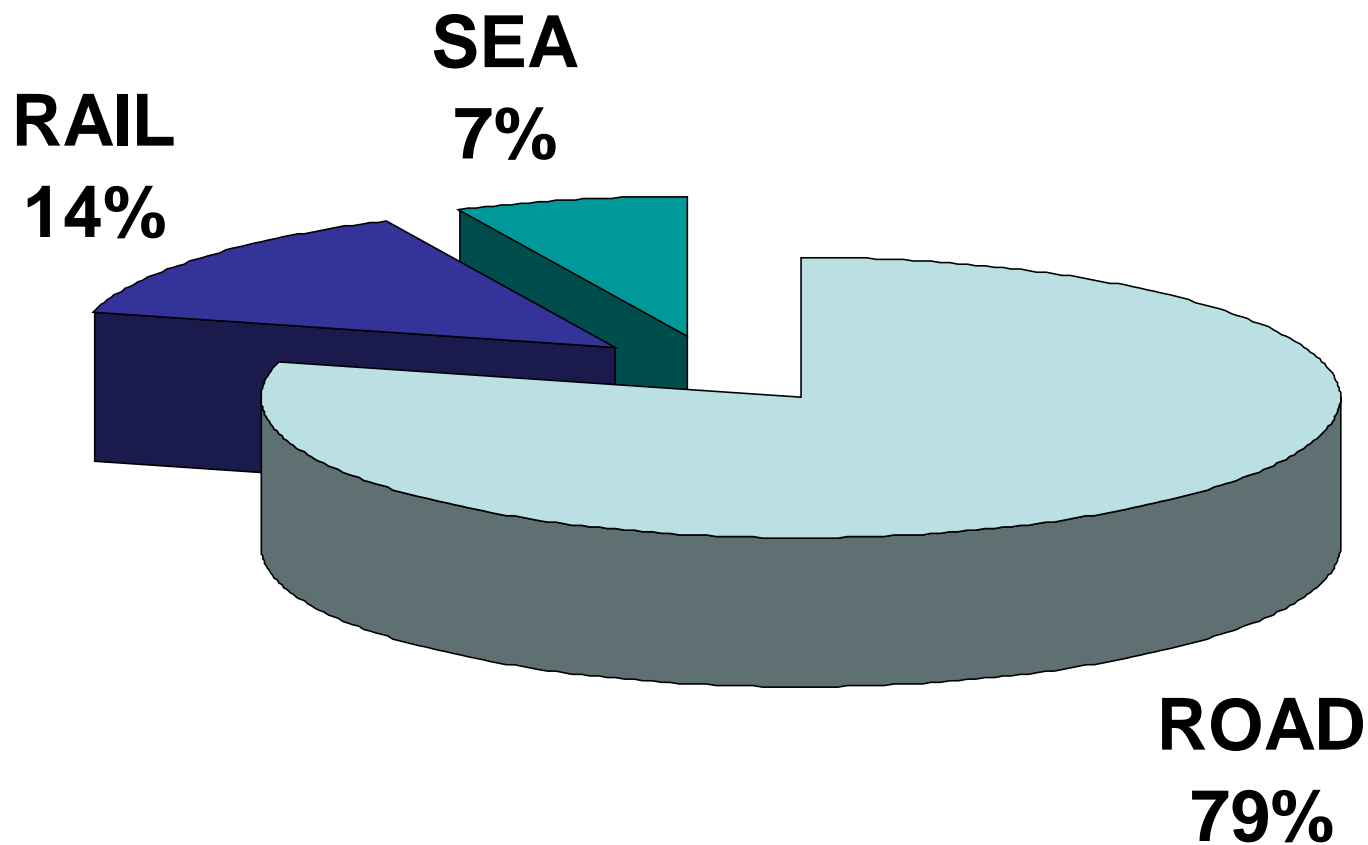
Logistics companies

Logistics companies	Companies	Turnover in €	Employees
Small companies	2.318	1.356.704.569	11.624
Middle companies	33	400.710.192	3.043
Large companies	24	1.664.272.487	22.115
TOTAL	2.375	3.421.687.248	36.783



TRANSPORT SECTOR

- Modal split



TRANSPORT SECTOR

7.082 Transport companies

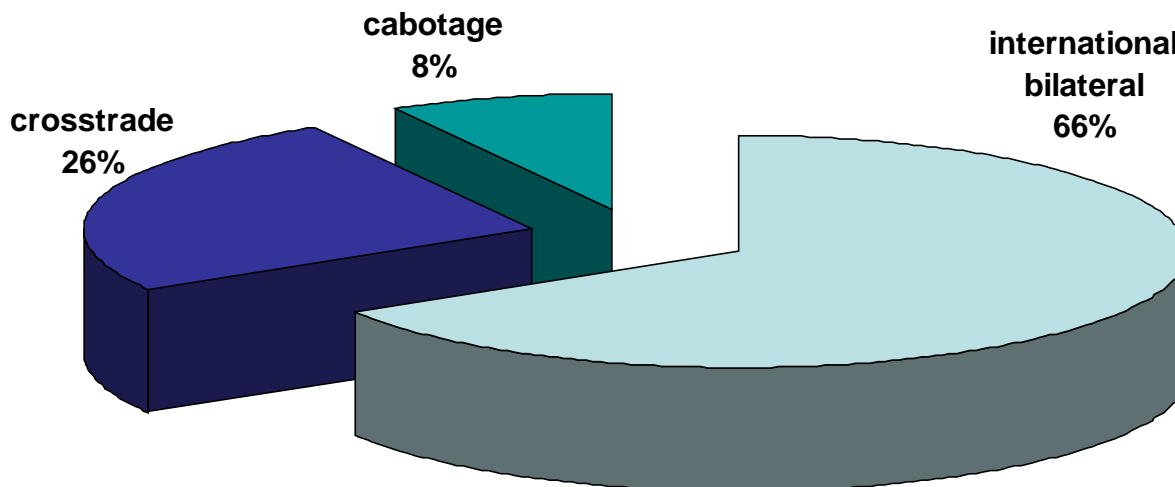
28.458 trucks over 3.5 tonnes load
capacity

31.303 professional drivers

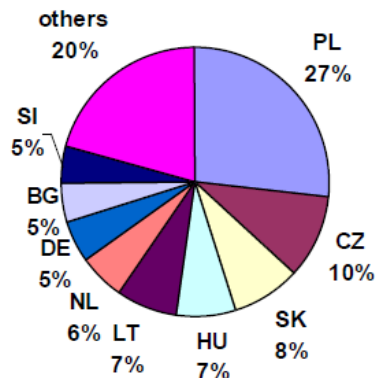


TRANSPORT SECTOR

- Share of international bilateral, crosstrade and cabotage transport in the activities of the hauliers (Number of journeys - loaded vehicle)

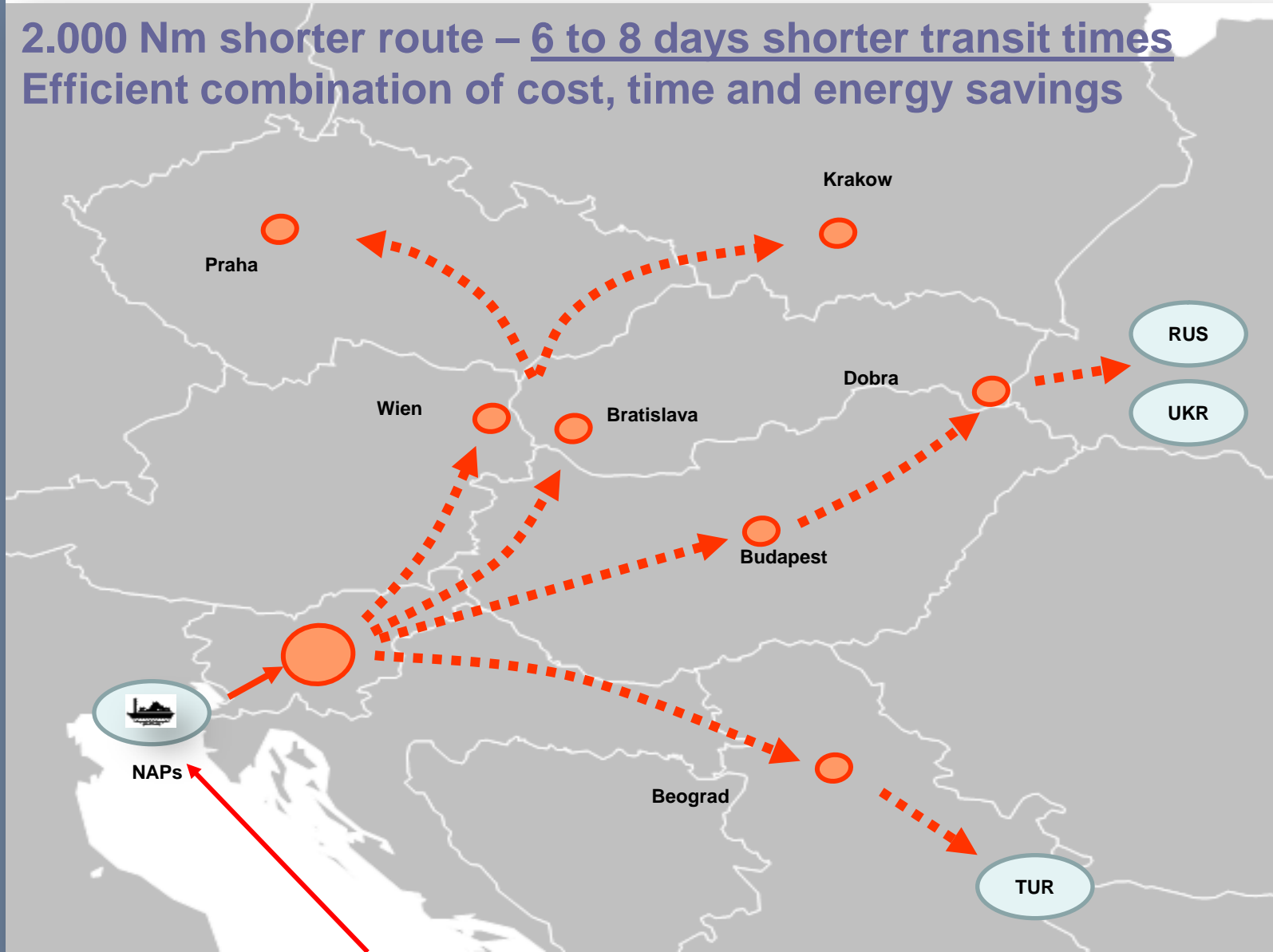


Origin of hauliers active in crosstrade in the EU in 2010
(based on the amount of tonne-km)

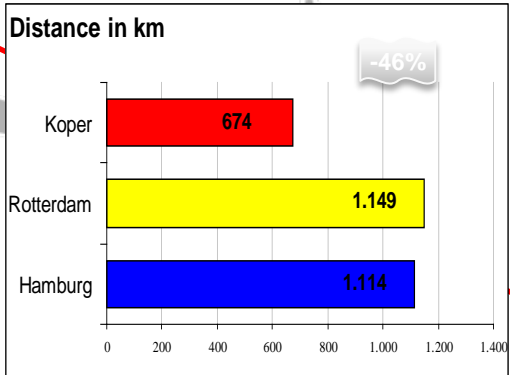
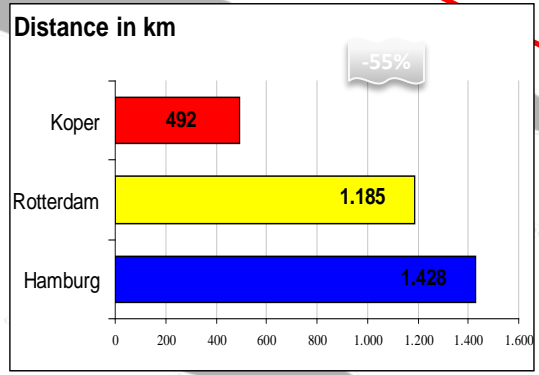
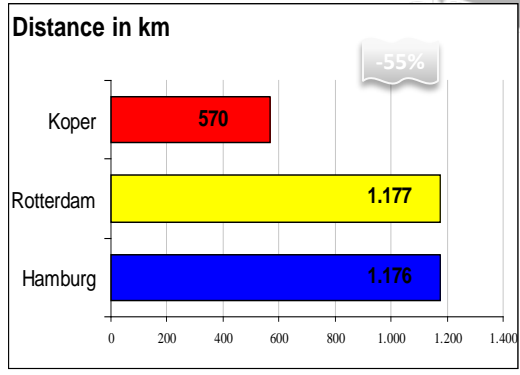
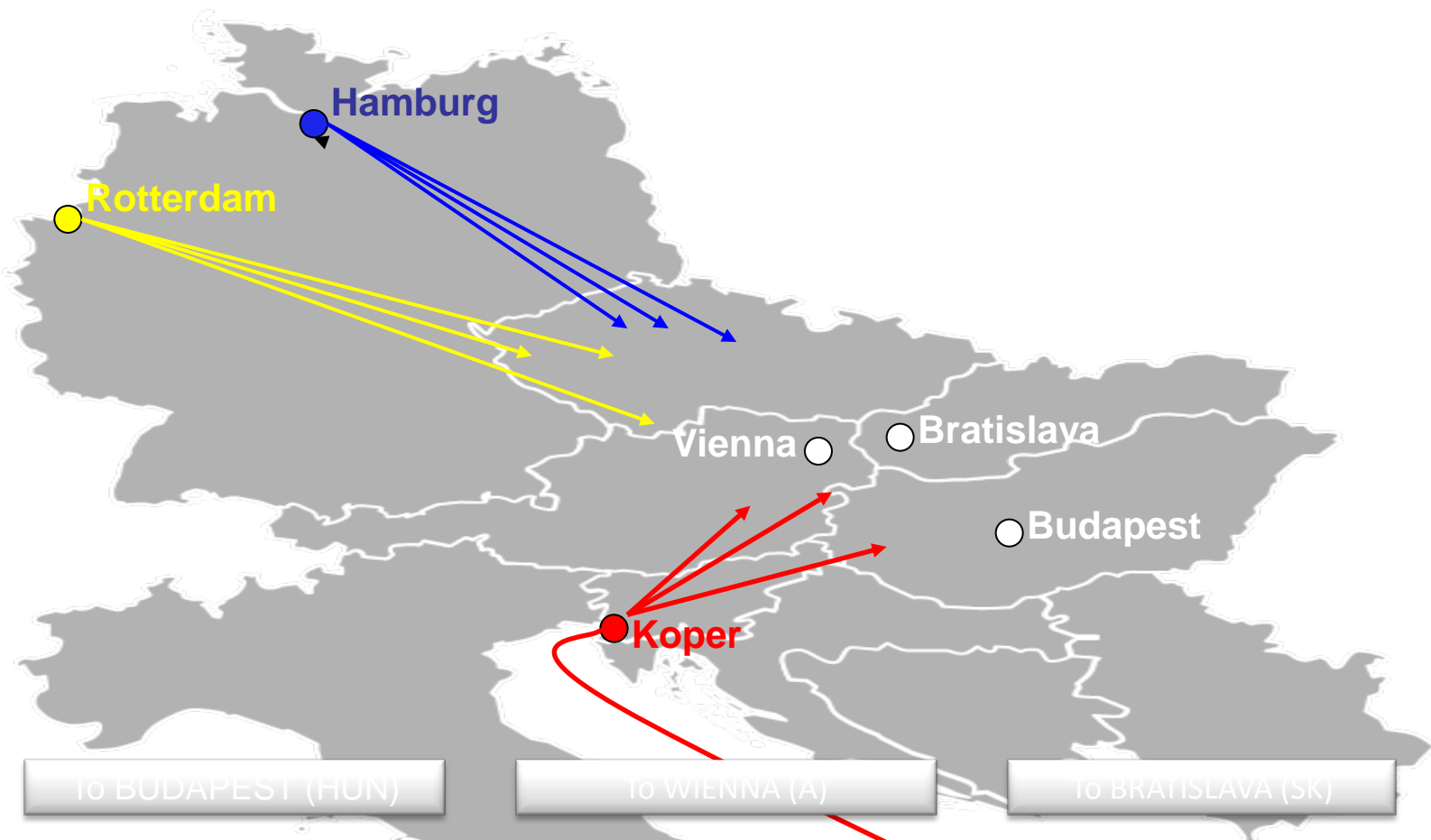


The shortest distance by sea from Far East to Central and South Eastern Europe

2.000 Nm shorter route – 6 to 8 days shorter transit times
Efficient combination of cost, time and energy savings



Comparison of Distance



Presentation of concrete logistical supply VIA KOPER / VIA Hamburg-Rotterdam (time savings)

	Delivery Time	
Category	via Koper	via RTM/HAM
Slovakia	24 hour	2 days
Hungary	24 hour	3 days
Austria	Overnight delivery	3 days



TRANSPORT ASSOCIATION
CHAMBER OF COMMERCE
AND INDUSTRY OF SLOVENIA

Thank you!

www.gzs.si