

## LOGISTICS MARKET

Rising wages  
have affected  
profitability

## TRANSPORT MARKET

Profit growing,  
but far from the values  
in 2015 and 2016

## COURIER MARKET

2018, a profitable  
year for Romanian  
couriers!

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# PO LOGISTICS T OPERATORS

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of TRANZIT  
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Magazine



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# Logistics industry is re-defining

Romania has been traditionally a market driven by automotive industry, due to the main cars manufacturer in the south, Dacia Renault. For a couple of years Ford plant in Craiova, taken over from the State in 2008, prepared for the real production in Romania and now we can really take advantage of two cars manufacturers with all the logistics and transport operations required. Even if the automotive industry is crossing a redefinition in Europe - with focus on electromobility, connectivity and car sharing services - the production in Romania is adapting quickly at these trends which will revolutionize the cars production. Tens of thousands of people lost the jobs already in German automotive industry because of the shift to electromobility and the move back has not finished yet. The maintenance and parts distribution will be also affected soon, while the logistics services offered to the automotive industry will also reconfigure. For the moment, the

low salaries in Romania compared to other European markets, the relative political stability and Brexit menace offer to our country good premises for at least maintaining the current development of the automotive business, if not further developments. New hybrid cars are manufactured here, new components for the electric cars are already delivered from Romania elsewhere, so the shift is felt also on our national market, still driven by diesel cars. At the same time, we see for several years and now more than ever an increasing interest for electric vans, LNG trucks and intermodal, everything for a Zero Emissions transport and distribution. Aside to the automotive business, traditionally important for the Romanian market, e-commerce is now the drive for the biggest development on the logistics market: new warehouses openings, new IT and platforms developers, taking overs and consolidations of courier services market. The logistics market around the new online

retailers is booming and offers big room for development for new players, but also to the well-established ones, more known for groupage services. Everything relies on the capacity of re-defining all the time, because the "rules" are changing quickly and innovation and speed are the key characteristics for adapting to the new demands of the market. China is pushing the shift mostly, developing roads, trains and any possible way to bring their goods to Europe. Besides the direct investments in infrastructure, Chinese are also more present in the European transport industry taking over important logistics and transport providers in The Netherlands and not only. To keep the business alive, information and its analysis are more important than ever. And our TOP Romanian Logistics Operators is a piece of precious information to understand the Romanian transport and logistics market and not only.

Marilena MATEI

# Rising wages have affected profitability

The profit margin of the logistics companies continued to decrease in 2018 and the main factor that affected these companies was the increase of the costs with the employees, which may often not be included in time or even at all in contracts. Out of the top 500 logistics companies, 65 registered losses, compared to 59 in 2017, of which 29 were on the list of companies that registered profit in 2017. More than half of the top 500 logistics companies succeeded to increase the turnover in 2018, but only about 200 companies also increased their profit. Out of these, about 150 companies achieved a profit growth below €100,000, and of the other 50 only CEVA Logistics exceeded one million euros profit growth, followed by IB Cargo with €929,000.

As expected, the largest turnover belongs to Schenker Logistics, up 4% in 2018 compared to 2017. The company reported an increase of 15% for contract logistics and 10% for the volumes transported by road. However, the profit decreased by 42% compared to the previous year, reaching three million euros, after an increase of over 100% in 2017 compared to 2016. Although the company has constantly registered increases in operational activity, the variations of profits come from the remaining assets of the former Romtrans, where it has been trying to put order for several years. Thus, the company tries to sell those assets that it does no longer need operationally. Some of these were sold in 2017, influencing the profit growth by 116% compared to 2016. As for the difference between receivables and debts, it reached €15

million, 5% lower than in 2017. Also, in 2018 the company also registered a slight increase of 5% in total assets, reaching €66.7 million.

After taking over the logistic activity of a well-known restaurants chain which brought

No.	Company	County	Difference turnover 2018-2017 (EUR)
1	HAVI LOGISTICS	BUCHAREST	18,453,522
2	GEFCO ROMANIA	BUCHAREST	15,405,079
3	TRANSMEC RO	BIHOR	7,083,047
4	YUSEN LOGISTICS	ILFOV	6,857,470
5	DSV SOLUTIONS	ILFOV	5,698,402
6	LB. CARGO	ILFOV	5,123,985
7	SCHENKER LOGISTICS ROMANIA	BUCHAREST	4,682,978
8	LAGERMAX AUTOTRANSPORT	ARAD	4,198,089
9	DELAMODE ROMANIA	BUCHAREST	3,623,513
10	KUEHNE + NAGEL	GIURGIU	3,509,675
11	KLG EUROPE LOGISTICS	GIURGIU	3,381,918
12	CEBRUDER WEISS	GIURGIU	2,814,215
13	FM ROMANIA	TIMIS	2,392,428
14	CARGO-PARTNER EXPEDITII	BUCHAREST	2,289,236
15	KARL HEINZ DIETRICH INTERNATIONAL EXPED	ILFOV	1,321,497
16	ATLAS IMOBILIARE	ALBA	1,190,541
17	COPET ROMANIA	BUCHAREST	1,021,106
18	QUEHENBERGER LOGISTICS ROU	ARGES	68,458
19	DHL LOGISTICS	ILFOV	-1,759,451
20	ORIENT	SUCEAVA	-2,286,988





No.	Company	Turnover (EUR)		Difference 2018-2017 (EUR)	Turnover (EUR)		Average turnover 4 years (EUR)	Average no. of employees
		2018	2017		2016	2015		
1	SCHENKER LOGISTICS ROMANIA	129,426,026	124,743,048	4,682,978	107,820,253	104,309,302	116,574,657	1,066
2	HAVI LOGISTICS	127,029,178	108,575,656	18,453,522	75,873,329	138,782,817	112,565,245	404
3	TRANSMEC RO	85,117,082	78,034,035	7,083,047	67,783,884	65,146,163	74,020,291	453
4	GEFCO ROMANIA	83,659,786	68,254,707	15,405,079	59,838,049	64,227,925	68,995,117	119
5	GEBRUDER WEISS	62,411,049	59,596,834	2,814,215	50,948,434	48,045,147	55,250,366	586
6	DSV SOLUTIONS	60,419,975	54,721,572	5,698,402	49,899,500	44,566,908	52,401,989	442
7	QUEHENBERGER LOGISTICS ROU	54,432,739	54,364,280	68,458	46,375,211	26,381,312	45,388,386	865
8	KUEHNE + NAGEL	52,002,971	48,493,296	3,509,675	39,362,760	45,328,829	46,296,964	550
9	YUSEN LOGISTICS	48,784,785	41,927,315	6,857,470	26,260,500	23,912,173	35,221,193	1,228
10	COPEL ROMANIA	43,106,575	42,085,469	1,021,106	47,392,324	38,967,639	42,888,002	90
11	HARTL CONNECT TRANSPORT GMBH AUSTRIA	41,587,081	50,578,464	-8,991,384	55,549,159	47,374,744	48,772,362	68
12	KLC EUROPE LOGISTICS	40,197,528	36,815,610	3,381,918	28,386,639	25,230,134	32,657,478	413
13	LAGERMAX AUTOTRANSPORT	38,657,404	34,459,315	4,198,089	29,984,400	26,763,770	32,466,222	261
14	I.B. CARGO	31,289,336	26,165,352	5,123,985	22,063,110	19,391,266	24,727,266	80
15	CARGO-PARTNER EXPEDITII	31,267,996	28,978,760	2,289,236	27,404,460	22,311,654	27,490,718	212
16	FM ROMANIA	28,828,143	26,435,715	2,392,428	24,464,576	24,163,802	25,973,059	740
17	DELAMODE ROMANIA	26,880,051	23,256,538	3,623,513	18,900,659	16,510,298	21,386,887	225
18	ROMFRACHT	26,166,198	30,696,146	-4,529,948	31,086,386	27,019,301	28,742,008	112
19	ATLAS IMOBILIARE	24,745,662	23,555,122	1,190,541	17,559,505	14,015,638	19,968,982	303
20	KARL HEINZ DIETRICH INTERNATIONAL EXPED	23,414,691	22,093,194	1,321,497	19,452,699	18,498,741	20,864,831	720

many losses in 2017, Havi Logistics managed to recover in 2018. The company remained second in the list of logistics companies in terms of turnover, with €127 million, up 17% compared to the previous year. Havi managed to have a slight profit of €237,000, after a loss of half a million euros in the previous year. The company also recorded the largest increase in turnover in the Top 500 logistics companies. The assets also increased by 14%, reaching €20 million. The difference between the big turnover and the small profit comes from the fact that, for some customers, the company buys the products from the suppliers and resells them to restaurants at the same price, so that its profit margin comes only from the logistical operations performed.

Third place in this top is occupied by Transmec, which increased its turnover by 9% in 2018 compared to 2017, reaching

€85 million. Increased interest in intermodal transport is also seen in Transmec's profit, which rose by 28%, reaching over two million euros. The company expanded its truck fleet in our country by 20 units, reaching 180. Currently, Transmec organizes its own trains on the Oradea-Zeebrugge routes (three trains a week, having as final destinations Great Britain and BeNeLux countries), Oradea-Piacenza and Oradea-Lodz (both twice a week) and public trains twice a week between Oradea and Duisburg. The company planned to open new intermodal lines in 2019 - Oradea-Ploiești, Oradea-Budapest and Oradea-Constanța - and it is studying the option of moving from Oradea to Stuttgart area. In addition, investments in this type of transport will continue by opening new own lines and by the purchase of specialized equipment (containers and mobile boxes). ▶

► **Gefco** also increased its turnover in 2018 by 23%, reaching about €84 million, and its profit by 25%, up to two million euros. The company's assets increased by 48%, to €24 million.

**Gebrüder Weiss** has maintained the same growth rate of turnover in recent years, reaching €62 million in 2018, 5% up compared to 2017. On the other hand, the company's profit fell by 32%, reaching a million euros. And the assets remained constant, 29 million euros. The decrease in profit was explained by company representatives by increasing costs with salaries and equipment.

In sixth place, **DSV Solutions** had a 10% increase in turnover in 2018, up to €60 million, but also a 16% decrease in profit, reaching €1.5 million. The company's assets reached €18 million, a 7% increase compared to 2017, mainly equipment for the warehouse.

**Quehenberger** has maintained the same turnover in 2017, but transport activity has affected its financial figures, so in 2018 it lost €1.5 million. The company continued to reduce the fleet and it reached 150 trucks in 2018, and by the end of 2019 half of the vehicles were supposed to be returned to the leasing company.

**Kuehne + Nagel** had a slight increase in turnover in 2018, 7%, to €52 million. The company's profit grew by about €430,000, reaching €1.6 million. Assets increased by 7%, reaching €9.6 million.

Ranked 9<sup>th</sup> in this top, **Yusen Logistics** (former Tibbet Logistics) posted a turnover of about €49 million in 2018, up 16% compared to 2017. Profit, however, decreased by 34% until

€1.9 million, and assets increased by 19%, reaching €14.7 million.

The last in Top 10 logistics companies arranged according to the turnover is **Copet Romania**, which increased its turnover by only 2% in 2018, reaching €43 million.

## CEVA Logistics had the highest profit growth

Although it had a 41% drop in profit, **Schenker Logistics** was also the first in Top Profit in 2018, with €3 million, followed by **Transmec**, which in 2017 was 6<sup>th</sup> in this top, with €1.8 million. After a 28% profit growth, up to €2 million, **Gefco** was in third place in this top. **IB Cargo** an increase of 80% in profit, reaching €2.1 million, with a turnover of €31 million, 20% higher than in 2017. The result is explained by the increase of applications for the urgent flights by plane, but also by the total volumes. After **DHL Logistics** has grown steadily in recent years, in 2018 the company posted a slight decrease of €151,000. In decline was also the turnover, from €30 million to €22. Thus, the company went down from the 13<sup>th</sup> place in 2017 to the 20<sup>th</sup> in 2018. After acquiring **Tibbet Logistics** at the end of 2017,

**Yusen Logistics** placed in 2018 in sixth place in Top Profit, with a profit 34% lower than the profit of the company it bought a year earlier, which was in second place in the same top. The situation could be explained by the 19% increase in assets compared to the previous year, reaching about €15 million.

The seventh place in the same top is occupied by **CEVA Logistics**, which

No.	Company	Difference profit 2018-2017 (EUR)
1	KLIG INVEST EUROPE	1,727,082
2	CEVA LOGISTICS	1,680,432
3	I.B. CARGO	929,770
4	TRANSMEC RO	505,053
5	DECOMAR LOGISTIC	470,919
6	GEFCO ROMANIA	435,869
7	KUEHNE + NAGEL	428,518
8	HERMES FORWARD	331,467
9	ENGLMAYER ROMANIA	313,967
10	FEROTRANS BANAT	309,688
11	DIETRICH-HONOLD LOGISTICS	296,769
12	EUROCCOPER	252,975
13	PALLET EXPRESS	246,413
14	STANDARD TRADING	240,228
15	MB CZECH IMPORT LOGISTIC	239,311
16	HAVI LOGISTICS	237,468
17	COPET ROMANIA	234,998
18	COTECNA ROMANIA	232,702
19	HARBORSZ LOGISTIC	217,267
20	ROMEXPED GROUP	207,530



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**Distribuție expres de mărfuri paletizate**

No.	Company	Profit (EUR)		Difference 2018-2017 (EUR)	Profit (EUR)		Average profit 4 years (EUR)	Average no. of employees
		2018	2017		2016	2015		
1	SCHENKER LOGISTICS ROMANIA	3,023,267	5,239,649	-2,216,382	2,524,441	3,561,082	3,587,110	1,066
2	TRANSMEC RO	2,340,818	1,835,765	505,053	1,063,355	1,129,806	1,592,436	453
3	GEFCO ROMANIA	2,152,640	1,716,772	435,869	1,229,432	2,043,188	1,785,508	119
4	IB. CARGO	2,140,277	1,210,507	929,770	1,045,997	1,004,660	1,350,360	80
5	DHL LOGISTICS	2,087,130	2,238,279	-151,149	1,720,946	1,603,488	1,912,461	73
6	YUSEN LOGISTICS	1,951,869	2,966,815	-1,014,946	2,229,888	1,464,043	2,153,154	1,228
7	KLK INVEST EUROPE	1,878,045	150,964	1,727,082	342,072	93,398	616,120	1
8	CEVA LOGISTICS	1,720,330	39,897	1,680,432	390,696	238,111	597,258	172
9	KUEHNE + NAGEL	1,658,443	1,229,924	428,518	763,523	715,922	1,091,953	550
10	KLK EUROPE LOGISTICS	1,622,165	1,553,396	68,769	903,209	1,117,668	1,299,110	413
11	DSV SOLUTIONS	1,566,114	1,858,281	-292,167	1,747,495	1,700,850	1,718,185	442
12	ATLAS IMOBILIARE	1,494,259	2,834,686	-1,340,427	1,910,059	1,679,098	1,979,526	303
13	KARL HEINZ DIETRICH INTERNATIONAL EXPED	1,407,102	1,616,757	-209,655	2,228,318	296,702	1,387,220	720
14	COTECNA ROMANIA	1,271,939	1,039,237	232,702	1,190,731	1,066,366	1,142,068	133
15	FEREST LOGISTICS	1,160,474	1,108,147	52,327	302,735	700,384	817,935	6
16	LAGERMAX AUTOTRANSPORT	1,135,058	1,100,576	34,482	1,449,032	848,880	1,133,386	261
17	DACHSER ROMANIA	1,091,854	1,113,275	-21,421	907,731	528,223	910,271	83
18	CEBRUDER WEISS	1,043,361	1,528,313	-484,952	1,635,943	2,098,395	1,576,503	586
19	DIETRICH-HONOLD LOGISTICS	957,065	660,296	296,769	687,529	1,175,254	870,036	169
20	EUROCCOPER	890,821	637,846	252,975	590,059	240,369	589,774	128

► increased its profit from €40,000 to €1.7 million, with a 55% increase of turnover, to €16.7 million, and an increase of assets with 50%, up to €5.4 million. The company also recorded the highest profit growth of the Top 500 logistics companies, €1.6 million, followed by IB Cargo, with a difference of almost one million euros compared to 2017. The following places in the top profits are occupied by Kuehne + Nagel, with €1.6 million, KLG Europe Logistics, with €1.6 million, and DSV Solutions, with €1.5 million. DSV Solutions came in 10<sup>th</sup> in Top Profit after decreasing its profit by 16% compared to 2017, while its assets increased by only 7%. The company, like the others, was strongly affected by the rising costs, especially those with wages.

## Losses grow

The first place in the losses top was occupied in 2018 by FM Romania, which

registered €1.7 million, after the €97,000 loss in 2017. The company is affected by the €20 million investment it completing in Dragomirești, in 2017, a 20,000 sq.m warehouse, half of which is dedicated to pharmaceuticals and half to cosmetics and FMCG. Competition in the pharmaceutical product logistics market has grown strongly in recent years, so there are already several large drug distributors that offer customers a wide range of logistics services. It is not excluded, however, that the company will also be affected by the changes on the management side in a very short time. Thus, after several good years in which the company was run by the Romanian Catalin Olteanu, he was replaced by the French Christoph de Korver, who, after only one year, was replaced by the Russian Alexander Pavlov. However, the company managed to attract customers in 2018, so that the turnover increased by 9%, reaching €28.8 ►



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No.	Company	Loss (EUR)		Difference 2018-2017 (EUR)	Loss (EUR)		Average no. of employees
		2018	2017		2016	2015	
1	FM ROMANIA	1,707,522	97,303	1,610,218	0	0	740
2	QUEHENBERGER LOGISTICS ROU	1,546,311	38,197	1,508,114	0	734,663	865
3	RABEN LOGISTICS ROMANIA	1,394,348	925,559	468,789	371,712	0	61
4	WHITELAND LOGISTICS	717,044	0	717,044	821,822	0	258
5	EKOL INTERNATIONAL LOGISTICS	689,642	0	689,642	0	0	101
6	NORDIC LOGISTIC	625,116	0	625,116	0	0	195
7	LAGERMAX AED	371,440	25,116	346,324	82,908	0	85
8	ARS ALTMANN RO	341,745	245,746	95,999	0	0	34
9	INTERNATIONAL BUSINESS TRANSPORT	323,579	0	323,579	0	0	128
10	ADD CARGO SOLUTIONS	272,834	1,791	271,043	0	3,895	16
11	INNIGHT ROMANIA EXPRESS	223,758	0	223,758	0	188,136	29
12	A. HARTRODT ROMANIA	217,865	350,908	-133,043	71,810	0	8
13	MUTU TRANS INTERNATIONAL	156,752	160,852	-4,100	102,464	0	0
14	EDIYON GERMANY	118,472	0	118,472	319	0	15
15	CECONI TRANSPORT ORADEA INTERNATIONAL	115,917	62,492	53,425	38,883	36,310	19
16	SAMSUNG SDS GSCL ROMANIA	114,917	4,188	110,729	0	0	4
17	DONAU TRANS CARPATICA	101,241	0	101,241	0	0	2
18	NDB LOGISTICA ROMANIA	99,734	0	99,734	0	0	67
19	INTERNATIONAL ROMEXPRESS SERVICE LTD	98,595	150,753	-52,159	0	0	16
20	UNIT LOGISTICS SERVICES	96,047	0	96,047	0	0	25

No.	Company	Assets (EUR)		Difference 2018-2017 (EUR)	Assets (EUR)		Average assets 4 years (EUR)	Average no. of employees
		2018	2017		2016	2015		
1	KARL HEINZ DIETRICH INTERNATIONAL EXPED	102,058,513	80,656,018	21,402,495	75,641,593	71,820,216	82,544,085	720
2	SCHENKER LOGISTICS ROMANIA	66,756,636	63,826,148	2,930,488	65,205,816	65,584,959	65,343,390	1,066
3	TRANSMEC RO	32,450,493	26,868,548	5,581,945	25,093,231	25,054,848	27,366,780	453
4	GERBUDER WEISS	29,397,997	29,159,563	238,434	25,200,689	25,810,074	27,392,081	586
5	GEFCO ROMANIA	24,606,593	16,650,229	7,956,364	18,045,970	16,341,178	18,910,993	119
6	LAGERMAX AUTOTRANSPORT	24,104,125	21,624,092	2,480,033	19,079,549	14,706,043	19,878,452	261
7	HAVI LOGISTICS	20,490,450	17,899,421	2,591,029	17,508,921	19,634,078	18,883,218	404
8	FM ROMANIA	18,196,817	15,252,925	2,943,892	10,927,792	11,886,908	14,066,110	740
9	DSV SOLUTIONS	18,119,503	16,943,033	1,176,469	14,474,106	12,555,018	15,522,915	442
10	DIETRICH-HONOLD LOGISTICS	15,046,300	12,809,318	2,236,982	13,444,232	14,408,247	13,927,024	169
11	YUSEN LOGISTICS	14,790,990	12,407,804	2,383,186	11,780,873	9,986,711	12,241,594	1,228
12	ATLAS IMOBILIARE	14,554,771	11,611,302	2,943,469	7,950,076	5,938,633	10,013,695	303
13	ERKAN LOGISTICS	13,202,743	13,499,254	-296,512	12,473,263	51,212	9,806,618	344
14	KLG EUROPE LOGISTICS	12,662,547	11,648,723	1,013,824	9,969,368	9,526,396	10,951,759	413
15	QUEHENBERGER LOGISTICS ROU	12,255,972	16,163,350	-3,907,378	11,817,020	8,875,193	12,277,883	865
16	ROMFRACHT	12,207,214	14,260,982	-2,053,768	13,360,607	12,309,875	13,034,670	112
17	DELAMODE ROMANIA	10,513,453	8,812,175	1,701,279	4,844,034	4,752,577	7,230,560	225
18	ORIENT	10,467,852	11,754,880	-1,287,028	11,563,026	9,325,795	10,777,888	67
19	KUEHNE + NAGEL	9,632,314	8,980,366	651,947	6,566,942	7,450,448	8,157,518	550
20	EKOL INTERNATIONAL LOGISTICS	9,306,920	9,755,332	-448,412	7,056,849	5,212,530	7,832,908	101



► million, and the assets by 19%.

Although in the top arranged by the turnover is on the 7<sup>th</sup> place, with a turnover of €54 million, Quehenberger Logistics is in second place in the Top of Losses, with €1.5 million, which has risen from €38,000 in 2017. As mentioned, the company has been severely affected by the transport activity it intends to reduce and to increase instead the logistics. The company is currently operating in a 150,000 sq.m storage space and plans to reach 200,000 sq.m by the end of 2020. Quehenberger Logistics became the logistics company operating the largest warehouse area in Romania.

After starting its activity in 2016, Raben Logistics Romania registered in 2018 losses of €1.3 million, ranking third in the Top Losses. On the other hand, the company's turnover almost doubled last year, reaching €5.6 million. The assets of the company also increased, reaching €1.6 million, from €1.2 million. The company's receivables reached €1.5 million and the debts reached €4.3 million.

## Only 30 companies increased considerably their assets

Out of the top 500 logistics companies, only 293 increased their assets in 2018, out of which only 30 achieved an increase of over one million euros. The first company in top assets, as expected, is **Karl Heinz Dietrich International**, with total assets worth €102 million, up 27% in 2018. The turnover of the company reached €23 million, up 6% compared to 2017, and the profit reached €1.4 million, down 13% from the previous year.

The second place in this top is occupied by **Schenker Logistics**, which recorded in 2018 total assets of €66.7 million, followed by **Transmec**, whose value of the assets rose to €32.4 million, increasing by 21% compared to 2017.

Karl Heinz Dietrich is also the company that recorded the biggest increase in total assets last year, €21.4 million, followed by **Cefco**, with a difference of almost €8 million, and **Transmec**, with €5.5 million. ■

No.	Company	Claims-debts (EUR)		Difference 2018-2017 (EUR)	Claims-debts (EUR)		Average no. of employees
		2018	2017		2016	2015	
1	SCHENKER LOGISTICS ROMANIA	15,059,876	15,870,730	-810,854	13,038,945	13,519,659	1,066
2	HARTL CONNECT TRANSPORT GMBH AUSTRIA SUCURSALA TIMISOARA	5,525,757	5,482,145	43,612	4,768,376	3,312,079	68
3	GEFCO ROMANIA	3,998,709	4,172,995	-174,286	-23,690	2,648,261	119
4	YUSEN LOGISTICS	2,512,718	551,722	1,960,997	-3,141,120	-5,460,972	1,228
5	KLC EUROPE LOGISTICS	2,254,790	637,554	1,617,236	1,248,540	1,489,425	413
6	CEVA LOGISTICS	1,703,395	-90,365	1,793,761	-1,122,868	-1,049,294	172
7	ALL CARGO EXPRES	1,501,495	1,290,974	210,520	1,382,125	1,720,379	29
8	HLESSERS LOGISTICS	1,265,942	1,012,671	253,271	536,322	189,104	152
9	I.B. CARGO	1,234,632	1,142,949	91,683	-148,506	882,616	80
10	ALI-TEHNIC	1,195,749	565,363	630,386	406,476	207,015	67
11	ORIENT	1,193,231	1,289,626	-96,396	2,100,268	1,385,985	67
12	DSV SOLUTIONS	1,133,625	615,546	518,079	707,058	1,041,196	442
13	RHENUS LOGISTICS	1,062,516	1,134,123	-71,607	932,249	871,060	39
14	DGH LOG & SPED	988,840	531,469	457,371	1,103,340	618,687	40
15	CARGO-PARTNER EXPEDITII	870,185	1,144,570	-274,385	631,109	180,381	212
16	HARBORSZ LOGISTIC	786,626	223,876	562,750	457,400	312,448	4
17	DACHSER ROMANIA	675,713	546,278	129,434	129,010	-75,506	83
18	PALLET EXPRESS	620,524	658,119	-37,595	26,517	-615,270	60
19	LEVANT MARITIME SERVICES	596,224	616,762	-20,538	622,295	628,171	18
20	ROHEL TRANS INTERNATIONAL	595,805	508,694	87,112	542,551	690,380	24

# Vectra Eurolift Service: celebrating 25 years on Romanian forklift market

Founded in 1994, Vectra Eurolift Service is one of the most important players on the Romanian forklift market. The company is the only national dealer of the Yale forklift brand, the latter having more than 100 years in designing and producing a wide range of forklifts and warehouse equipment.

In all these years, Vectra evolved from a small office in the center of Bucharest to a big office building and two workshops on capital's North road, with 70 employees. After the crisis period, the company has experienced an extraordinary development and today its turnover is more than 12 million euros.

Vectra and Yale have a successful partnership since 2015. Exceeding the sales target every year, in 2019 Vectra celebrates not only 25 years of activity, but also the 1000<sup>th</sup> forklift ordered at Yale.

Vectra Eurolift Service offers to its customers a full range of products and services:

- Diesel / LPG counterbalance forklift trucks, 3-wheel and 4-wheel electric trucks, hand pallet trucks, electric pallet trucks, electric pallet stackers, order pickers, reach trucks, VNAs
- Short term rental and long term rental with full service
- Multibrand spare parts, traction batteries, chargers, tires, forks etc.
- 20 teams of technical engineers (with properly equipped vehicles) in Bucharest,



Cluj-Napoca, Braşov, Timişoara, Roman

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# 2018, a profitable year for Romanian couriers!

The Romanian courier market exceeded €845 million in 2018 and the development of online commerce - which has brought very large volumes for the postal and courier services - had the biggest contribution. It is impressive that, despite the inefficiency and outdated services, CN Poșta Română remains the leading company, followed by the largest private company - FAN Courier - which in 2018 has reached a turnover of more than €147 million. Overall, the top 10 companies generated almost 90% of the total turnover.

In 2018, the Top 30 Postal and Courier service, one of the most dynamic economic sectors, where operate approximately 1,500 companies, generated a turnover of almost €820 million (excluding UPS Romania, who have not declared the figures), increasing by more than 10% compared to the same period in 2017. Following the trend of the last years, the growing was given by domestic online retail, because many companies find it difficult to cope with the demand for logistics and transport services, especially from online stores.

## The turnover of the top companies

Despite the logistical and personnel problems it faces, Poșta Română continues to be the main player in the field. The company owned by the Romanian state through the Ministry of Communications (75%) and by Fondul Proprietatea (25%) registered in 2018 a turnover of €249,533,855 million, with a slight increase - just 1% - over the same period in 2017. The explanation for such a large



turnover is that a large part of this income comes from the payment of pensions. In addition, the State company benefits of the largest national distribution network, more than 5,500 postal subunits in the whole country, distributing more than 11 million postal items weekly. In total, based of its own data, over 19 million inhabitants benefit from the services of the company. This efficiency in terms of turnover was realized with basically the same average number of employees - 23,404 - like in 2017, decreasing with 836 people from 2016.

FAN Courier Express, which is ranked second, being the largest privately-owned company in the market, had a turnover of over €147 million, up €19.1 million (15%) compared to 2017. The growth was made possible with an average number of 2.738 employees, an increase with 265 people, despite the lack of work force in the market - especially blue-collars. As we found out from the company's Chief Commercial Officer, Cornel Morcov, the main problems regarding personnel are in Cluj County, "where we have to fulfil every week with dozens of couriers, handlers, even managers from Bucharest and sometimes even from other locations". To solve a part of this deficit, FAN Courier has started The FAN SCHOOL, a



No.	Company	Turnover (EUR)	Claims-Debits (EUR)	Profit netto (EUR)	Loss netto (EUR)	Assets (EUR)	Average no. of employees
1	COMPANIA NATIONALA POSTA ROMANA	249,533,855	-76,699,794	8,251,313	0	194,541,759	23,404
2	FAN COURIER EXPRESS	147,606,379	-14,798,507	17,206,397	0	105,051,499	2,738
3	URGENT CARGUS	91,335,867	-38,172,464	0	778,905	51,645,425	1,200
4	TNT ROMANIA	76,711,513	-1,362,536	2,279,700	0	15,913,303	423
5	DHL INTERNATIONAL ROMANIA	62,188,670	-166,420	2,375,425	0	17,130,156	453
6	GLS GENERAL LOGISTICS SYSTEMS ROMANIA	35,941,282	-3,931,361	6,791,515	0	19,067,326	151
7	UPS ROMANIA	35,173,297	5,108,271	2,131,577	0	14,803,846	150
8	DYNAMIC PARCEL DISTRIBUTION	29,499,913	-6,816,612	0	541,861	13,231,374	443
9	NEMO EXPRES LOGISTIC	26,721,801	-710,390	366,137	0	6,204,079	367
10	DELIVERY SOLUTIONS	18,725,876	-15,590,514	0	6,190,093	13,856,223	425
11	DSC EXPRES LOGISTIC	11,950,118	918,518	461,548	0	4,371,218	225
12	TOTAL POST SOLUTIONS	11,350,858	-6,014	557,426	0	4,094,246	37
13	CRAISS LOGISTIK	9,306,569	-4,762,751	507,070	0	9,600,870	24
14	POSTA ATASSIB CURIER RAPID	6,851,070	-1,096,769	0	566,902	2,548,802	386
15	ECONT FOR YOU	4,312,838	-230,471	361,380	0	1,555,379	9
16	DRAGON STAR CURIER	4,046,404	-699,190	242,123	0	1,705,934	300
17	BOOKURIER LOGISTICS	3,732,463	-310,734	516,662	0	1,039,913	35
18	INBOX MARKETING	3,530,726	268,719	0	6,603	1,069,556	253
19	PINK POSTMASTER	3,526,264	925,183	167,308	0	1,530,323	1
20	VIVA POST SOLUTION	3,138,090	-28,661	178,963	0	1,618,327	3
21	NEMO PROD COM IMPEX	3,131,053	-287,232	78,641	0	4,605,629	59
22	ANDAY LOGISTIC EXPERT	2,902,790	-403,146	0	36,035	802,563	22
23	X CURIER EXTREM	2,870,593	-1,696,351	2,213,985	0	2,553,794	153
24	ROMCURIER	2,674,204	-389,510	397,613	0	1,111,896	175
25	PASCAL	2,430,374	-437,302	206,856	0	672,500	187
26	PRES MEGA	2,229,283	-235,644	3,682	0	478,372	9
27	URGENT CURIER POST	1,851,623	-7,489,101	337,743	0	9,611,608	14
28	FASTIUS CURIER	626,539	-152,940	6,810	0	321,197	39
29	TOP PRESTPORT COM	617,391	169,971	9,317	0	448,152	60
30	SPRINT CURIER EXPRES	406,565	-300,791	0	317,080	311,396	6

project to form people with less or no skills and train them for the company's needs.



The top is completed by third-placed Urgent Cargus, with a turnover of €91.3 million, up by nearly 12% compared to 2017, when it registered €81.6 million. With a 38% increase in turnover - €76,7 million - TNT

ranks fourth, exceeding the German company DHL, who was fifth, with €62,1 million. Next position is held by GLS General Logistics Systems Romania, the courier company from Sibiu, with nearly €36 million, while UPS Romania ranks seventh with €35,1 million, down a position from 2017. The ranking is completed by DPD Romania with almost €30 million, up by €2.6 million (about 10%). In the last couple of years, the company has invested a lot in resources to improve performance, from changes of operational software to new services for clients, up to internal processes reorganization. The following places are occupied in order by Nemo Expres Logistic with an 22% increase to the ninth place - €26.7 million - and Delivery Solutions, which has the most

► spectacular increase - 109% - up to €18.7 million.

Noteworthy that the top 10 companies in the courier market have a cumulative turnover of over €773 million, which represents almost 90% of the market, while on the following positions, from 11 to 30, there are companies with a total turnover of €81.5 million.

## Claims are higher than in 2017

Analysing the data of all 30 companies, we note that seven of them have experienced losses in terms of difference between claims and debts. Moreover, the claims in 2018 are higher than the ones in 2017, which make us assuming that payment terms have increased.

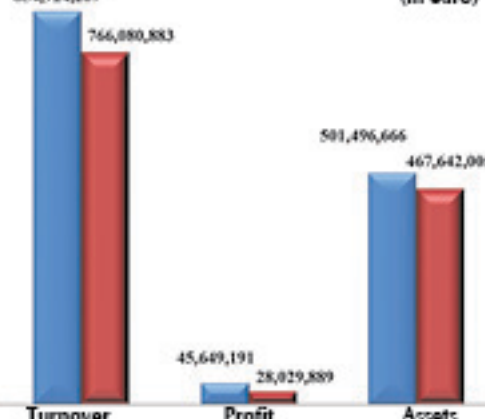
The difference between claims and debts for all the companies analysed is over €174.49 million, with an improved balance over 2017. Thereby, the difference between those two years is about €13.5 million in favour of 2018. The company with the biggest debts is **Poșta Română** - over €100 million - although the number is smaller than previous year. Also, the State-owned company have claims of almost €34 million. The second place in terms of debts is held by a big player, **Urgent Cargus**, with about €52.26 million in minus, but with €14 million in claims. **FAN Courier**, the largest player in the market, holds third position with €33.16 million, while has to recover €18.36 million in claims.

## Rising fleets, same losses

With a wide national network, **FAN Courier** constantly invests in his own fleet,

**The evolution of the courier market**

(in euro)



and the amount in 2018 was 19% over 2017, to about €10.7 million. With total assets of €194 million, **Poșta Română** has current assets worthing €47.8 million, with an increase over 2017 of almost €4 million. **Delivery Solutions**, the company that

operates the **Sameday Courier** brand and part of the **eMAG** group, recorded an increase in his fleet of 151%, to nearly €6.2 million from €2.45 million to years before. Last places are occupied by **Fastius Curier** - a decrease of 13% compared to 2017 - and **Pascal SRL**, with just over €208,000 and €109,177 respectively.

In terms of another key term, **Profitability**, **FAN Courier** records the most dynamic growth, with nearly €17.2 million in profits in 2018, which are reinvested by the three shareholders, followed by **Poșta Română**, which had a net profit of €8.25 million in 2018 and **GLS General Logistics Systems Romania**, with almost €6.8 million.

The total profit is €45.6 million, of which 90% is made by the first 10 companies, a 39% plus compared to 2017.

Last, but not least, only seven players reported minuses for a total of about €8.4 million which is about the same figure as in 2017. As then, the biggest losses are held by **Delivery Solutions Company** from Bucharest, with a minus that almost doubled at €6.19 million. At long distance is **Urgent Cargus** with €778,905 and **Poșta Atlassib Curier Rapid**, which records a loss of a €566,902, an improvement compared to 2017, when the net loss was about €900,000. ■



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# Profit growing, but far from the values in 2015 and 2016

The first 20 companies as turnover obtained in 2018 had a total of €1,184,653,456 - compared to €1,057,3223,469 in 2017 - that is 24.28% of the total turnover of the operators on Top 500, while the total amount achieved last year in Romanian transport was €10.3 billion. Most leading companies talk about cost increases that they could not fully cover from tariff increases, but increasing volumes and maximizing efficiency have resulted in an increase (very small in 2018, from €50,187,748 to €51,623,959) for the total profit of the operators in Top 20. The first 20 companies with the highest turnover have almost 11.5% of the total turnover obtained by all the transport companies in the country, while the same companies add up to 10% of the total net profit obtained at industry level.

**B**ut we should analyse this data taking into account that Carrion did not publish the financial statement for 2018.

The first place in the top of the transport operators by turnover in 2018 belongs to **Aquila Part Prod Com**, with €209,402,406, 5% over the value of 2017 - €198,844,241. The company has grown steadily over the last four years, from €151,732,912 registered in 2015.

On second place in the ranking is **Vos Logistics Cargo**, with €110,677,160, compared to €80,606,728 in 2017 (an increase of 37%). In 2014, the Dutch shareholders of Vos Logistics began to transfer the management of the international transport activities from the Netherlands to Romania, a process which ended in 2018. Now there are three separate entities: Vos Logistics Bulk (10<sup>th</sup> in the Top 20 according to the turnover of 2018, with €42,906,419, compared to

€1,283,189 in 2017), Vos Logistics Cargo and their shareholder Vos Logistics Romania (16<sup>th</sup> place in Top turnover of 2018, with €36,796,235, compared to €37,799,552 in 2017). The transfer did not affect the results of the group, but, on the contrary, the turnover increased in 2018 by 8%. Progresses exist both on the international transport segment, as well as on the solutions and services, in parallel with a doubling of the net profit, in comparison with 2017, from €3.5 to €6.7 million. From the total turnover of the company - €140 million for freight and €50-60 million for bulk goods - last year the part of the Romanian branch

amounted to €37 million. Shipments represent 20% of this activity, groupage transport 5% (more in Belgium) and international transport 75%. Out of the 185 vehicles registered in Romania, 50 are specialized for bulk goods and the rest for general merchandise. In addition to its own fleet, Vos Logistics also works with subcontractors, who own 80





No.	Company	County	Turnover (EUR)		Difference 2018-2017 (EUR)	Turnover (EUR)		Average turnover 4 years (EUR)	Average no. of employees
			2018	2017		2016	2015		
1	AQUILA PART PROD COM	PRAHOVA	209,402,406	198,844,241	10,558,165	177,716,356	151,732,912	184,423,979	2,249
2	VOS LOGISTICS CARGO	CLUJ	110,677,160	80,606,728	30,070,432	0	0	47,820,972	13
3	DUVENBECK LOGISTIK	BRASOV	82,680,353	73,552,011	9,128,342	67,616,410	61,954,998	71,450,943	834
4	INTERNATIONAL ALEXANDER	ARAD	69,591,739	55,702,200	13,889,540	46,144,986	37,743,272	52,295,549	867
5	SKIPTRANS	CLUJ	61,433,134	44,926,830	16,506,304	33,075,194	34,911,544	43,586,676	751
*	PANEURO INTERNATIONAL	MURES	58,599,174	6,274,224	52,324,950	8,118,075	7,945,765	20,234,310	123
6	XPO TRANSPORT SOLUTIONS ROMANIA	ARAD	55,353,217	60,526,992	-5,173,775	63,982,556	70,951,234	62,703,500	591
7	DOLO TRANS OLIMPIC	ARGES	52,161,984	38,668,521	13,493,463	35,046,641	12,447,240	34,581,096	429
8	GARTNER EUROTRANS ROMANIA	TIMIS	49,927,725	39,898,409	10,029,316	29,114,259	20,176,160	34,779,138	783
9	ARCESE TRANSPORT	CLUJ	48,632,881	48,344,163	288,718	42,961,901	36,712,933	44,162,970	466
10	VOS LOGISTICS BULK	CLUJ	42,906,419	1,283,189	41,623,230	0	0	11,047,402	12
11	DIANTHUS COMPANY	ARGES	40,942,437	39,685,622	1,256,815	34,412,715	33,535,222	37,143,999	368
12	RAVITEX	BIHOR	39,899,187	40,087,925	-188,738	40,480,839	33,444,715	38,478,166	450
*	MICROFRUITS SRL	BUCHAREST	38,903,727	30,990,315	7,913,412	26,770,418	28,475,158	31,284,905	80
13	INTERNATIONAL LAZAR COMPANY	ARGES	38,543,283	41,733,366	-3,190,083	36,946,613	42,270,429	39,873,423	463
14	H E S S E R S	BIHOR	38,181,838	34,106,597	4,075,242	30,036,034	28,547,113	32,717,896	611
15	DUNCA EXPEDITII	TIMIS	37,905,759	35,563,156	2,342,603	35,504,245	37,829,420	36,700,645	565
16	VOS LOGISTICS ROMANIA	CLUJ	36,796,235	37,799,552	-1,003,317	37,799,677	28,185,615	35,145,270	358
17	TOTAL N S A	SIBIU	36,341,212	42,694,834	-6,353,622	45,747,641	53,070,057	44,463,436	424
18	DUMAGAS TRANSPORT	DOLJ	35,773,584	33,028,494	2,745,091	30,188,951	36,559,170	33,887,550	365
19	PRACTICOM	BUCHAREST	35,223,142	25,872,810	9,350,331	14,753,268	8,838,744	21,171,991	731
22	J.T. GRUP OIL	CONSTANTA	34,021,309	26,865,593	7,155,716	28,933,134	28,074,253	29,473,572	30

vehicles, and use Vos Logistics semitrailers. The trucks fleet registered in Romania is used mostly in the Community, about 85% returning to international transport and too little to the groupages. But the vehicles also do national transport. The company has 457 employees (330 drivers and 127 indirectly productive personnel), even though the Romanian branch was established in 2012 from scratch.

In third place in this top is **Duvenbeck**, with €82,680,353, 12% above the value in 2017, of €73,552,011, and with constantly

increasing results in the last four years. The Braşov company was also in third place in 2017 in this ranking, but after Carrion, so if the Spanish-origin carrier would have released the financial results and they would have been in tune with those in 2017, Duvenbeck would have relegated a position, because of the rise of Vos Logistics.

In fourth place is **International Alexander**, which is one place up from 2017 and reaches €69,591,739, 25% more than in the previous year (€55,702,200). The turnover of the company from Arad ▶



► has increased year by year in the last five years, but in 2018 it has increased more compared to 2017, because the new fleet was acquired, which brought added value and the possibility of gaining new transport volumes. "In addition, we have new partners who work constantly with us, subcontractors and traction contractors, and the warehousing and logistics services directly in customer factories have also generated a growing turnover", stated Loredana Apreutese, general manager of the company. And in 2019 will also appear the results of the transport of vehicles. In 2018 the demand for transport and logistics registered an explosive growth. The key element that determined this is the increase of consumption, respectively of production. International Alexander specialized every year in the automotive sector, an innovative and complex industry, it was open to change and remained in close contact with customers, in order to identify the necessary solutions for a well-defined flow, customized solutions, leading to optimization, both in transport and logistics. "2018 has been, more than ever, a year of reinvention, adaptability and strategy, a dynamic environment, which requires a future-oriented attitude." The company was organized as a holding of 10 independent companies, in order to have a good image on the efficiency of each activity in the logistics chain. For 2018 there is no consolidated balance

sheet of the 10 entities, but International Alexander (the transport company) had a turnover of 323,601,588 lei, International Alexander Logistic had 8,569,169 lei, and International Alexander Line Spedition (dealing with vehicle transport), 1,755,757 lei. That is 85% of the turnover comes from transport and 15% from logistics. The decision to set up companies in Serbia, Hungary and Germany and to promote the services abroad has led the company to new opportunities. International Alexander Holding, having Simion Ioan Apreutese as CEO and shareholder, has ISO 9001, 14001, 18001, 45001, AEO, TSR3 certification, it is currently being certified for TSR1 and it has a portfolio of services including FTL transport, LTL, groupages, distribution, air, maritime, vehicle transport, warehousing & logistics services, professional packaging washing and logistics directly in customer factories. The company also has clients for domestic transport, as package with the international, and it has direct contracts with several clients, especially from the south and west of the country, without more than 10% exposure for any of them, "which it was also helpful to us in mixing the trips, besides the stability we tried to keep as we were not dependent on a certain partner."

The fifth place belongs to Skiptrans, the Cluj branch of the Belgian company Jost (seventh place in 2017), with €61,433,134, 37% above the €44,926,830 in 2017. The difficult situation caused by the charges ►







# Transport internațional

## Locațiile noastre



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► brought to the Belgian employer and the seizure of 346 trucks from Romania could have led to the closure of the business, especially since the company had to pay the salaries and taxes corresponding to the 346 drivers and leasing rates. Indeed, Skiptrans lost some customers, but their number was small enough not to affect the financial results. On the contrary, the total volumes increased by taking over new customers and by developing the internal transport activity, where 15 trucks are now working, and by the end of 2019 it was planned to reach 40. In the next 1-2 years it is estimated that 20% from the activity will be represented by national trips, especially groupages. 80% of transport orders are based on fixed contracts, in order to be predictable. The fleet in Romania has been extended from one year to another, in 2019 already 150 trucks were registered, and the number was supposed to reach 200 units by the end of the year, of which 90 vehicles are Iveco LNG, out of a total of 500 units ordered throughout the Jost group.

On the next place is **Paneuro International**, a new company entered in the Top 20, following an increase of turnover from €6,274,224 in 2017 to €58,599,174 in 2018. An unusually high value compared to those from previous years, €4-7 million. And, because the company did not make any profit, on the contrary, it had one of the biggest losses in the industry in 2018, we decided to eliminate it from the Top 20. Thus, on the sixth place is **XPO Transport Solutions** (fourth place in 2017), with €55,353,217, decreasing from €60,526,992 in 2017.

**Dolo Trans Olympic** is this time in seventh position, up from the 13<sup>th</sup> a year ago, due to an increase from €38,668,521 to €52,161,984 (+35%). The turnover was higher in 2018 because the company mobilized better, as the general manager



Cristian Dolofan says, also having the experience of the previous years in which it was hit by the same instability, legislative changes and decisions made from one day to another, which leads to a lack of predictability. "We decided not to set any goals from the beginning of the year, but we first tested the ground and mobilized when we saw that we could start investments." In the second part of the year, when freight transport stopped, the company focused on extending the car storage platforms and the car-carrier fleet. The increase of the turnover in 2018, to a greater extent than the increase of the previous years, was due to the fact that the company developed on several fields, the fleet was 80 assemblies bigger than in 2017, the storage spaces became functional and extended service activity. The profit increased in 2018 for the same reasons and, if the transport market stalled at the end of 2018, the compensation came from the storage activity, on a platform with a 1,500-2,000 vehicles capacity and a reserve for another 1,500. So that the company will continue to rely on the development of new products and services and the improvement of existing ones, precisely to bring added value. The fleet will be constantly extended and the company will invest in buy back every five years, which is efficient because the costs are lower than those caused by the eventual maintenance of older trucks. As for 2019, the strategy of the past year has been maintained and therefore the results were expected to be very good. In 2018, the company bought 40 Lohr Megatrailer superstructure trucks, Mercedes-Benz representative service is operational and serves a greater number of customers, and



the route efficiency program implemented in 2017 continues to deliver results. Among the main challenges that 2020 will bring there are, as Cristian Dolofan considers, the ethics of business partners, the losses caused by the unserious, bad-paying clients - "which is why we started to focus on developing the relationships with the clients we work with from the beginning and to rely less on expanding the portfolio with partners we do not know" - and the longer payment term.

In eighth place is **Gartner Eurotrans**, with €49,927,725, compared to €39,898,409 in 2017, when it was on the 11<sup>th</sup> place. On the ninth is **Arcese Transport**, down from the sixth in 2017, with an increase of 1%, from €8,344,163 to €8,682,881, and the 10<sup>th</sup> position, as we said, is occupied by **Vos Logistics Bulk**.

On the 11<sup>th</sup> place in the top of transport operators according to the turnover in 2018, as in 2017, is **Dianthus Company**, with €40,942,437, compared to €39,685,622 in the previous year. The slight increase is due to the acquisition of 50 new trucks, some of which were for fleet renewal, and some for expansion. The figures, including profit, could have been much better if the company had not experienced excessive driver migration in the second half of the year, which meant that 10-15% of the fleet would not work. "Even under these conditions, we honoured all the transport orders", says Dan Niculescu, the transport manager of the Pitești company, "but we

could not increase the customer portfolio and the transport volumes". After the winter holidays, however, the situation has improved considerably - "it seems that the drivers are convinced that the difference in income is not very big if they work abroad compared to Romania and, in addition, that they do not come home as often", and they returned to the country - so Dianthus could use all the trucks again. The turnover of the company increased in 2018 and 2019 also for domestic transport (this represents less than 10% of the total turnover). Here Dianthus uses a dedicated fleet consisting of about 30 trucks that work mainly for the automotive industry. As for the near future, Dan Niculescu is not worried about the Mobility Package, because it will take time before it is adopted, "but what concerns us is the political-economic situation in Europe. It seems that a new crisis is coming, there are already signs in Germany, which is why we do not make any investment plans."

Following is **Ravitex**, in the 12<sup>th</sup> place, with €39,899,187, a very slight decrease from the €40,087,725 in 2017, when it was in the 10<sup>th</sup> place. **Microfruits**, with €38,903,727, up 26% from the €30,990,315 in 2017, is not taken into account in this top, because the turnover in transport represents less of the total activity consisting mainly in distribution and trade, and its own fleet is small. That is why on the 13<sup>th</sup> place is **Internațional Lazăr Company**, with €38,543,283, 8% less than the previous year, when it had €41,733,366 and was ninth. Following **H.Essers**, with €38,181,838, 12% more than the €34,106,597 in 2017, when he ranked 17<sup>th</sup>, **Dunca Expediții**, with €37,905,759, 7% more than the €35,563,156 in 2017, when it was on 15<sup>th</sup> place, and **Vos Logistics Romania**.

Total N S A is on the 17<sup>th</sup> place - much lower than in



► 2017, when it was on the eighth - with €36,341,212, 15% less than the €42,694,834 from the previous year.

Dumagas is 18<sup>th</sup>, up 8% from the €33,028,494 in 2017, to €35,773,584. The growth was similar to 2016 in 2017, given that the fleet was not larger, but the acquisitions were only to replace the last Euro 5 trucks for domestic transport and for transport in Central and Eastern Europe with Euro 6 trucks for transport in Western Europe. 50% of the increase in turnover is due to the internal transport department, 25% to the international one, 15% to the storage and logistics at controlled and ambient temperature and 10% to the sales of old trucks, because in 2018 the project of renewing the fleet, started in 2014, was completed. 63% of the turnover in 2018 comes from international transport, including cars or industrial gas (nitrogen, oxygen, carbon dioxide), for which the company has 39 assemblies. Another 25% come from domestic transport with two-temperature own vans, towed by the vehicles of other companies, 6% from logistics and 6% from other activities, given that in 2017 the international had a share of 65%, the internal, 23% and the other activities, 6% each. The profit in 2018 was €236,646, compared to the one declared in 2017, €100,000, and it was divided between transport (60%), storage and distribution (25%) and sale of trucks (25%). As noted by Lucia Apostol, Chief of Operational Excellence at Dumagas, 2018 was a year of changes in the transport

market compared to 2015-2017. The domestic transport registered spectacular growth, based on the increase of consumption, and the companies that could manage the necessary capacity had gained. At the intra-Community level, the demand was similar to the one of the previous years, but the increase of the fuel price, by about 11% compared to 2017, and the lack of drivers, which attracted another cost increase, of at least 10%, made the profit from this activity much lower than in 2017, as the tariff increase only covered 50% of the cost. In order to counterbalance the effects of the costs, better transport planning was done, the routes were re-analysed and the unprofitable ones were given-up, some routes were re-offered, the loads were optimized and cash management was better. On the other hand, in the second half of the year the negative effects of the future Brexit and the Mobility Package were reflected in media and, in addition, for Dumagas, the economic situation of Turkey caused the company to close the dedicated transport division in this country, which had been developed in the last 10 years. The Craiova operator invested in 2019 in 30 Mercedes-Benz Actros Euro 6 trucks to replace the old Euro 5, in 50 new Renault Trucks and MAN trucks to renew the 2015 fleet and in 25 new Schmitz semitrailers for which it has called for operational and financial leasing. It also sold old trucks worth about €100,000 in 2018, continuing to do so in 2019, which increases its profits.

The ranking ends with Practicom, in 19<sup>th</sup> place, with a turnover of €35,223,142, 36% higher than in 2017, and with J.T. Group Oil, with €34,021,309, 27% more than in 2017.

Only four companies in Top 20 in terms of turnover registered a lower value in 2018 than in 2017: Vos Logistics Romania (-3%), Internațional Lăzar Company (-8%), XPO (-9%) and Total NSA (-15%). ►





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## ► Nine operators in Top 20 had lower profits than in 2017

32 transport companies had a profit of more than €1,000,000 in 2018 and, leaving aside Carrion, which in 2017 was seventh in this ranking, the profit of the 20 most profitable companies in 2018 was €51,623,959, slightly above the value of €50,187,748 registered by the 20 most profitable companies in 2017 (which are not exactly the same as those in the Top 20 in 2018; the 20 top companies in 2018 had a total profit of €45,098,751 in 2017). On the first place in this top there is a traditional presence, **Transpeco Logistics & Distribution**, with €6,760,778, compared to €7,166,241 in 2017. The decrease is caused by the fact that the increase of tariffs did not cover in certain periods of the year the increase of prices, such as wages and fuel. 70-80% of the profit

comes in 2018 from operational activities and the rest from the sale of trucks and from financial placements, a percentage that, too, maintained from one year to another. In 2018, Transpeco had a turnover of €25,079,651, slightly rising compared to the €23,749,925 in 2017, due to the increase in volumes transported for some customers and the slightly higher tariffs. But as a whole, 2018 has been in line with the previous years for the transport of petroleum products, as the company executive director Dragoș Gădoiu declares, because both the major fuel suppliers and the specialized carriers



No.	Company	County	Profit netto (EUR)		Difference 2018-2017 (EUR)	Profit netto (EUR)		Average profit 4 years (EUR)	Average no. of employees
			2018	2017		2016	2015		
1	TRANSPECO LOGISTICS & DISTRIBUTION	BUCHAREST	6,760,778	7,166,241	-405,463	7,217,758	7,502,320	7,161,774	303
2	EURO FLEET TRANSPORTS	CLUJ	5,278,143	2,551,219	2,726,924	1,752,679	2,302,733	2,971,194	207
3	DIANTHUS COMPANY	ARGES	3,509,463	4,343,268	-833,804	3,918,125	6,133,481	4,476,084	368
4	INTERNATIONAL ALEXANDER	ARAD	3,506,251	3,127,258	378,993	2,254,536	1,241,575	2,532,405	867
5	EUGEN TRANS	TELEORMAN	3,160,683	959,904	2,200,779	345,384	634,019	1,274,998	83
6	FARTUD	TIMIS	2,980,443	3,057,236	-76,794	3,515,662	4,142,481	3,423,956	293
7	SKIPTRANS	CLUJ	2,932,221	2,663,429	268,792	3,171,135	3,829,373	3,149,039	751
8	AQUAKI TRANS	PRAHOVA	2,690,151	231,601	2,458,550	374,217	2,194,600	1,372,642	81
9	DUVENBECK LOGISTIK	BRASOV	2,419,427	2,028,011	391,416	3,409,388	3,117,085	2,743,478	834
10	MICROFRUITS	BUCHAREST	1,989,922	1,635,685	354,237	1,138,490	1,203,617	1,491,929	80
11	ROYAL TRANS	BUCHAREST	1,987,452	2,037,598	-50,146	832,383	236,793	1,273,556	81
12	VIO TRANSGRUP	DAMBOVITA	1,944,081	2,083,521	-139,440	1,745,270	1,317,220	1,772,523	139
13	AGEXIM SPEDITION	ARGES	1,891,216	1,142,599	748,617	392,902	571,743	999,615	360
14	LOGISTIC E VAN WIJK	CLUJ	1,844,013	2,461,813	-617,799	2,778,471	2,562,848	2,411,786	378
15	BINAR SPEED EXCLUSIVE	PRAHOVA	1,519,483	1,480,119	39,364	1,528,324	765,720	1,323,411	171
16	TRANS EURO EXPRESS 94	BUCHAREST	1,512,630	2,333,857	-821,227	2,396,614	2,202,194	2,111,324	312
17	PORT TRANS	DAMBOVITA	1,434,580	1,459,605	-25,025	1,956,522	582,531	1,358,309	66
18	MARACANA	TIMIS	1,432,678	1,398,425	34,252	1,321,597	633,730	1,196,607	183
19	EXPRESS EUROSCAN	SUCEAVA	1,417,821	1,384,618	33,203	756,607	497,243	1,014,072	145
20	ROZOTI PRODCOM	BIHOR	1,412,523	1,552,745	-140,222	1,087,143	863,249	1,228,915	84



are about the same and these companies have understood that sustainability can be achieved only by making investments: suppliers of products have to do investments for increasing their quality and transport operators have to invest in fleet and state-of-the-art equipment. The turnover of 2019 was expected to be slightly increasing compared to 2018 due to the additional volumes contracted and the tariffs 5% above the level of 2017.

**Euro Fleet Transport** is in second place, with €5,278,143, a substantial increase, 107%, compared to 2017, when it had €2,551,219 and was in sixth place.

In third place among the most profitable transport operators in Romania is **Dianthus**, with €3,509,463, decreasing (because of the lack of drivers in the second part of the year) compared to €4,343,268 in 2017, when it ranked second. The turnover registered in the first half of 2019 is at the same level as in 2018, given that 25 new Mercedes-Benz trucks were purchased for both the renewal and the expansion of the fleet. But profitability is lower primarily because of increased driver costs and road taxes and of tariffs that have not increased. "What affected us most in 2019 were the cost for drivers' accommodation at the hotel. Basically, they stay at the hotel in all countries - Germany, France, Spain, Italy, Belgium, Netherlands - and in Germany, for example, you can't find a room for less than €100. We try to accommodate 2-3 drivers in one room, but this implies additional dislocations, not covered in the transport price", says Dan Niculescu. In addition, in recent years, since drivers are paid per day, their productivity and the average number of kilometres travelled by trucks have decreased, as employees are no longer motivated to use their driving program efficiently. The profit for 2018 came largely from the operational activities and to a very small extent from the sale of trucks, because

the demand in this segment has decreased much. As for the profit from domestic transport, it was significantly smaller, but it does not have a significant share in the total profit of the company.

In the fourth place is **Internațional Alexander**, with €3,506,251, up 12% from the €3,127,258 in 2017. Internațional Alexander has grown in 2018 compared to 2017 in terms of profit, but not as much as in the last years. Divided by companies, the net profit was 16,304,068 lei for Internațional Alexander, 1,175,244 lei for Internațional Alexander Logistic and 254,501 lei for Internațional Alexander Line Spedition. So, the margin is bigger in case of logistics than in case of transport. The profit of the company is mostly influenced by the operational activities, both the expenses related to the current activity and the amortization of investments, and it has not increased to the same extent as in previous years because the company had a lower margin compared to the own fleet. "But I think it is necessary that our subcontractors and tractionists have the opportunity to support their expenses and to have a profit." The increase of the assets made the expenses with the depreciation increase, which diminished the rate of profit increase. The expenses that increased the most in 2018 are those with diesel, labour and road taxes. The latter ones and, partially, the fuel were assimilated by the customers by increasing the tariffs, and the costs with the employees were partially covered by internal optimizations and partially not covered, which affected the profit. The company made a profit, but not significantly compared to the total profit, also from the sale of 20 trucks from 2013. And in 2019 it was expected to maintain the profit from 2018, although the labour costs have increased last year.

**Eugen Trans** occupies the fifth position, with €3,160,683, up 229% from the

► €959,904 in 2017, when it was not in Top 20. The sixth company in profitability is **Fartud**, with €2,980,443, down 3% from the €3,057,236 in 2017. **Skiptrans** follows in ranking, with €2,932,221, 10% more than in 2017, when it had a profit of €2,663,429 and was fifth, **Aguaki Trans**, with €2,690,151, 1,062% more than in 2017, when it had €231,601 and it was not in Top 20, **Duvenbeck Logistik**, with €2,419,427, 19% more than the €2,028,011 in 2017, when it took the 14<sup>th</sup> place, and in the tenth position is **Microfruits**, with €1,989,922, 22% above the €1,635,685 in 2017.

On the second part of the ranking, the 11<sup>th</sup> place belongs to **Royal Trans**, with a profit of €1,987,452, 2% less than in 2017, when it occupied the 13<sup>th</sup> place, followed by **Vio Transgrup**, with €1,944,081, 7% less than in 2017, when it was still in 12<sup>th</sup> place. Last year the company made operational its own warehouse of 2,000 sq.m, thus completing the transport services offered to the customers, and among the plans for the next period is the construction of another centre, 10,000 sq.m, authorized by TAPA FSR, and the purchase of distribution vans, in order to cover the entire logistics chain. The warehouse activity has been profitable since the second month of operation, and the turnover was €460,000 after the first six months, with 16 customers. The company had, at the end of 2018, 191 20 tons trucks - 60 own and the rest of dedicated subcontractors - and 27 own units, all Scania, were purchased in 2018 for the partial renewal of the fleet. The plan is that

at the end of 2020 its own fleet number 100 trucks of 20 t, all for transport of high values. The volumes on this segment have doubled from year to year, starting in 2014, since the company offers this service, and the trend continues.

In the 13<sup>th</sup> place is **Agexim Spedition**, with €1,891,216, up 66% from the profit in 2017, when the company was not in Top 20, the 14<sup>th</sup> is **Logistic E Van Wijk**, with €1,844,013, 25% below the value of 2017, when it ranked eighth, and the 15<sup>th</sup> is **Binar Speed Exclusive**, with €1,519,483, 3% above the value of the previous year, when it was on the 18<sup>th</sup>. The 16<sup>th</sup> position is occupied by **Trans Euro Express 94**, with €1,512,630, down by 35% compared to 2017, when it was on the ninth place, and the 17<sup>th</sup>, by **Port Trans**, with €1,434,580, 2% less than in 2017, when it was in 19<sup>th</sup> place.

In the 18<sup>th</sup> place is **Maracana**, with €1,432,678, 2% more than in the previous year, when it was on the 20<sup>th</sup>. The turnover of the company increased last year by 22% compared to 2017, up to about 13 million euros, due to the efficiency of the trips and the fact that the investment of 1.5 million euros in its own warehouse on the Timisoara ring-road became operational in 2018, with the takeover of the logistics and local transport for Coca Cola HBC Romania, whose goods occupy about 99% of the total area of 5,000 sq.m. Maracana transports the goods from the factory in Timișoara, but also makes the local transport to the key accounts' platforms. Transport contributes with about 70% to the turnover of the company and most of the activity is related to Germany, where volumes have increased quite a lot in 2018 both for import / export and intra-Community trips. In 2018, the company also started the domestic transport, with five trucks traveling to Austria and then in Romania, and in 2019 five others joined them. 2018 also brought a reconfiguration of the trips, in order to optimize costs, especially those with diesel







and wages, which few customers accept to cover entirely. All these solutions, combined with an increase of the other activities of the company, construction and agriculture, led to a 22% increase in turnover and 2% in profit.

In the 19<sup>th</sup> place is **Express Euroscan**, with €1,417,821, 2% above the value of 2017, when it was not in Top 20 by profit, and the ranking ends with **Rozoti Prodcom**, with €1,412,523, down 9% from 2017, when it was 17<sup>th</sup>.

Nine companies out of the first 20 in terms of profit had a lower value than in 2017, with percentages between 2% (Port

Trans and Royal Trans) and 35% (Trans Euro Express 94).

## A new leader in the Loss ranking

Two transport companies have losses of over two million euros, other three, more than one million euros, and the rest up to 20<sup>th</sup> place between €610,623 and €982,926. The first place in the ranking of the biggest losses is **Klacska** (in second place in 2017 after XPO Transport Solutions), with €2,862,418, with an insignificant decrease, 1%, compared to the value of 2017. The ranking continues with **Paneuro International**, with €2,616,012, which in 2017 had a profit of €99,070, **Kraft Logistic**, with €1,266,934, compared to €38,141 in 2017, **B.H.L. Logistic**, with €1,222,507, down 56% from the loss in 2017, when it was third in this ranking, and **ATP Transit**, with €1,076,286, up 77% compared to the loss in 2017, when he was in 10<sup>th</sup> place. ▶

No.	Company	County	Loss netto (EUR)		Difference 2018-2017 (EUR)	Loss netto (EUR)		Average loss 4 years (EUR)	Average no. of employees
			2018	2017		2016	2015		
1	KLACSKA ROMANIA	BUCHAREST	2,862,418	2,877,577	-15,159	2,276,041	0	2,004,009	205
2	PANEURO INTERNATIONAL	MURES	2,616,012	0	2,616,012	0	0	654,003	123
3	KRAFT LOGISTIC	MURES	1,266,934	38,141	1,228,793	166,431	63,820	383,832	252
4	B.H.L. LOGISTIC	SIBIU	1,222,507	2,769,591	-1,547,084	364,787	0	1,089,221	65
5	ATP TRANSIT	MARAMURES	1,076,286	608,243	468,043	378,026	0	515,639	146
6	CARPAT BETON SERVICII POMPE	ILFOV	982,926	799,783	183,143	874,016	474,596	782,830	42
7	RODBUN CARGO	BUCHAREST	879,505	1,054,900	-175,395	1,135,280	497,021	891,677	85
8	AUTO MILI	BUCHAREST	804,270	346,828	457,442	248,167	0	349,816	41
9	HENRIK HANSEN	SATU MARE	748,590	516,592	231,998	441,184	0	426,591	268
10	WHITELAND LOGISTICS	BUCHAREST	717,044	0	717,044	821,822	0	384,717	258
11	TRANSPORTURI AUTO	BOTOSANI	696,970	0	696,970	0	0	174,242	160
12	FRIGOEXPRES	BIHOR	695,705	1,088,315	-392,610	1,465,297	243,151	873,117	108
13	OWSAN LOGISTICA	ARGES	680,698	36,407	644,291	0	0	179,276	33
14	EPA TRANSPORT	TIMIS	633,115	279,164	353,951	0	0	228,070	142
15	GARTNER EUROTRANS ROMANIA	TIMIS	612,587	481,012	131,575	0	638,891	433,123	783
16	TRANS SESE	CLUJ	560,599	243,681	316,918	0	0	201,070	286
17	XPO TRANSPORT SOLUTIONS ROMANIA	ARAD	550,562	2,944,888	-2,394,326	3,456,791	4,781,709	2,933,488	591
18	F.S. TRANSPORTSERVICE	TIMIS	455,825	41,570	414,255	0	0	124,349	44
19	ALOSCO	HUNEDOARA	429,541	0	429,541	0	0	107,385	58
20	VIMATRA LOGISTICS	BUCHAREST	428,699	22,496	406,203	0	0	112,799	52

► The sixth place is **Carpat Beton Servicii Pompe**, with €982,926, up 23% compared to the loss in 2017, when it was ninth, and the seventh, **Rodbun Cargo**, with €879,505, decreasing by 17% compared to the loss in 2017, when it was in the same position. **Auto Mili** had a loss of €804,270 in 2018, 132% higher than in 2017, when it occupied the 18<sup>th</sup> position, and it is now in the eighth place. **Henrik Hansen** is ninth, with €748,590, 45% more than in 2017, when it was 11<sup>th</sup>, and the Top 10 ends with a new company, **Whiteland Logistics**, with €717,044 (this company had a profit of €65,006 in 2017).

On the 11<sup>th</sup> place is **Transporturi Auto**, with €696,970 (this company had a profit of €78,796 in 2017), followed by **Frigoexpres**, with €695,705, a 36% decrease from the loss in 2017, when it was in the sixth place, **Omsan Logistica**, increasing by 1,770% compared to 2017, up to €680,698, **EPA Transport**, with €633,115, 127% more than in 2017, when it was not in the Top 20 operators with the highest losses, and by **Gartner Eurotrans**, with €612,587, 27%

more than in 2017, when it was in 13<sup>th</sup> place.

The ranking ends with **Trans Sese**, with a loss of €560,599, 130% higher than in 2017, when it was not in the Top 20, **XPO Transport Solutions**, the leader in 2017, with €550,562, down 81% compared to the previous year, **FS Transportservice**, with €455,825, up 997% compared to the loss of €41,570 in 2017, **Alosco**, €429,541 (in 2017 the company had a profit of €30,672) and in the 20<sup>th</sup> place is **Vimatra**, with €428,699, an increase of 1,806% compared to the €22,496 loss in 2017.

## Top 20 assets in 2018 have a lower value than in 2017

The first 20 transport companies in 2018 according to assets have a total of €631,801,417, compared to €688,257,392 the first 20 operators in the 2017 top. Since we do not have information about **Carion**, which in 2017 was the first company in Top active, we note that the first 10 companies in the top 2018 appear also among the

No.	Company	County	Fleet			Assets (EUR)	
			2019	2018	2017	2018	2017
1	AQUILA PART PROD COM	PRAHOVA	339	440	432	92,998,398	81,381,004
2	INTERNATIONAL LAZAR COMPANY	ARGES	314	299	352	59,718,958	60,294,418
3	DOLO TRANS OLIMPIC	ARGES	340	317	263	57,171,056	43,582,270
4	INTERNATIONAL ALEXANDER	ARAD	348	327	302	49,947,030	40,216,796
5	XPO TRANSPORT SOLUTIONS ROMANIA	ARAD	213	387	550	41,892,549	51,853,895
6	TOTAL N S A	SIBIU	269	279	272	30,219,195	28,703,256
7	TIR EXPRESS	TIMIS	87	109	128	28,963,295	28,271,790
8	DUVENBECK LOGISTIK	BRASOV	245	260	249	24,877,112	20,301,588
9	ARCESE TRANSPORT	CLUJ	194	223	215	24,688,271	25,223,371
10	TRANSPCO LOGISTICS & DISTRIBUTION	BUCHAREST	295	276	255	23,978,611	22,182,609
11	SKIPTRANS	CLUJ	611	468	376	21,880,083	15,477,682
12	ROMSTYL IMPEX	DAMBOVITA	310	301	312	20,786,755	23,928,983
13	DIANTHUS COMPANY	ARGES	308	308	292	20,611,925	21,797,625
14	EURO FLEET TRANSPORTS	CLUJ	194	224	223	20,442,241	19,196,624
15	TRAMECO SA (SELINA)	BIHOR	50	49	51	20,159,452	17,574,891
16	VOS LOGISTICS CARGO	CLUJ	-	41	-	20,124,496	18,464,960
17	HOLLEMAN SPECIAL TRANSPORT & PROJECT CARGO	BUCHAREST	69	73	70	19,139,040	12,462,389
18	DUNCA EXPEDITII	TIMIS	367	434	430	18,813,238	14,096,113
19	TRANS EURO EXPRESS 94	BUCHAREST	211	191	198	17,795,903	17,447,152
20	RAVITEX	BIHOR	213	216	212	17,593,808	17,480,984





in fifth place, and by **Internațional Alexander**, with €49,947,030, 24% more than in 2017, when it was in sixth place. The company

top of 2017, although in another order, and four other companies (Romstyl Impex, Dianthus Company, Euro Fleet Transport and Trameco) appear in the Top 20 in both years. New entries in 2018 are Skiptrans, Vos Logistics Cargo, Holleman Special Transport, Dunca Expediții, Trans Euro Express 94 and Ravitex.

On the first place in Top 20 assets is **Aquila**, with €92,998,398, up 14% from €81,381,004 in 2017, when it ranked second after Carrion. The company from Ploiești is followed at big distance by **Internațional Lazăr Company**, with €59,718,958, in slight decrease, by 1%, compared to the €60,294,418 in 2017, when it was in third place, by **Dolo Trans Olimpic**, with €57,171,056, 31% over the €43,582,270 in 2017, when it was

invested in 2018 in the renovation and expansion of the fleet with about 100 vehicles and in a field in Sebeș, where a logistics warehouse will be built, and started the projects for the investments in Giarmata (here the Class A warehouse has already been completed in the meantime and by the end of the year the operations of warehousing and logistical services were supposed to begin), Sibiu and Bucharest. The class A warehouse finalized in Arad is functional and productive and it has space for professional washing of packaging. Also in Arad was completed the parking for its own fleet and the service. In addition to logistical projects in its own warehouses, **Internațional Alexander** is active in projects directly in customer factories and its team, together with the LEAN management of the company, managed, together with the customers, to record very good results and to optimize operations. **Internațional Alexander** has also purchased plots for an intermodal terminal and it is waiting to obtain the necessary permits for this segment. The company intends to renew part of the fleet in 2020 and to extend it, in parallel with the increase of the number of subcontractors and traction contractors, because, having projects in progress for the next 3-4 years, it is not expected to be affected by the decrease in volumes. Nor does it reject the idea of hiring non-EU drivers, in order to have additional work force and balance in the behaviour of certain drivers. Moreover, the instability on the labour market is the reason why it was difficult to implement an internal optimization plan, and this is, in Loredana ▶

Difference 2018-2017 (EUR)	Assets (EUR)		Average assets 4 years (EUR)	Average no. of employees
	2016	2015		
11,617,394	77,107,935	68,409,704	79,974,261	2,249
-575,460	60,274,299	60,482,118	60,192,448	463
13,588,786	37,686,736	19,602,739	39,510,700	429
9,730,234	36,121,470	25,021,779	37,826,769	867
-9,961,346	63,539,128	60,572,095	54,464,417	591
1,515,939	24,187,286	22,971,862	26,520,400	424
691,505	28,168,541	25,115,293	27,629,730	127
4,575,524	19,061,644	16,488,825	20,182,292	834
-535,100	18,975,408	19,140,943	22,006,998	466
1,796,002	19,956,091	21,723,961	21,960,318	303
6,402,401	9,270,013	10,874,700	14,375,620	751
-3,142,228	23,393,930	21,807,741	22,479,352	439
-1,185,700	19,470,250	20,237,454	20,529,314	368
1,245,617	18,401,577	17,744,515	18,946,239	207
2,584,561	12,239,616	14,028,578	16,000,634	44
1,659,536	1,912,718	0	10,125,544	13
6,676,651	11,271,616	9,552,099	13,106,286	108
4,717,125	15,054,985	12,188,597	15,038,233	565
348,751	13,338,323	9,961,287	14,635,666	312
112,824	18,851,857	16,842,189	17,692,209	450

► Apreutese's opinion, the main challenge for the next period.

In the fifth place in the assets top is **XPO Transport Solutions**, with €41,892,549, the decrease of 19% bringing in this case a drop with two places compared to the previous year. The following four positions are occupied by **Total NSA**, with assets of €30,219,195 in 2018, up 5% compared to 2017, when it occupied the eighth position, **Tir Express**, with €28,963,295, 2% over the value of the assets in 2017, when it was the ninth company in this ranking, **Duvenbeck**, with €24,877,112, with a 23% increase which brought a quite spectacular rise in the ranking, from the 16<sup>th</sup> place in 2017 to the eighth in 2018, and **Arcese Transport**, with €24,688,271, down 2% compared to 2017, when it was in 11<sup>th</sup> position.

In the 10<sup>th</sup> place is **Transpeco**, with assets of €23,978,611 in 2018, slightly rising from the €18,640,018 in 2017. The fixed assets had increases due to extension of the fleet, the intangible assets have increased due to the bigger investments in software licenses, the current assets have not been significantly changed and the debts have also slightly increasing as payment terms have been increasing in recent years, reaching 30 or even 60 days. As for the assets abandoned in 2018, there are some old transport units and the location in Iasi (the garage and the office), which had no activity anymore.

In 11<sup>th</sup> place is **Skiptrans**, with €21,880,083. The subsidiary of the Belgian company Jost does not retire from Romania, but it continues the investments in a logistics base on the 6 ha land purchased near the airport in Cluj-Napoca, where the current offices will be moved and warehouses will also be built for cross-docking, but also for storing the goods collected in groupages, which can then go abroad. In the same location the company plans to build a service and a truck wash, which will provide services for third parties.

The 12<sup>th</sup> position, as in 2017, is occupied by **Romstyl**, with €20,786,755, down 13% from the €23,928,983 in the previous year.

On the 13<sup>th</sup> place in assets top is **Dianthus**, with €20,611,925, compared to €21,797,625 in 2017, when it occupied the 14<sup>th</sup> position. The value was slightly lower also due to the sale of some trucks, but also to the depreciation of the goods, given that the fixed assets have increased steadily in recent years, through the annual increase of the fleet.

The 14<sup>th</sup> and 15<sup>th</sup> places are occupied by **Euro Fleet Transport**, with €20,442,241, 6% above the €19,196,624 in 2017, when the company was 17<sup>th</sup>, respectively by **Trameco**, increasing by 15%, from €17,574,891 to €20,159,452 and rising from the 20<sup>th</sup> place occupied in 2017. On the 16<sup>th</sup> position is **Vos Logistics Cargo**, with €20,124,496, compared to €18,464,960 in 2017. The company invested in 2018 over €46 million, including here, among others, the acquisition of 400 trucks and 480 new semi-trailers and state-of-the-art on-board computers, which, in combination with the driver training, helps improve safety by reducing the number of technical errors and damages, reduces the fuel consumption and increases the comfort of the driver. In addition, the offices have been moved into a modern space, which involved an investment of about €250,000.

The last four positions in Top 20 by assets are occupied by companies that were not in Top 20 in 2017: **Holleman Special Transport & Project Cargo**, with €19,139,040, a substantial increase, by 54%, compared to the €12,462,389 in 2017, **Dunca Expediții**, with €18,813,238, also a significant increase, with 33%, compared to 2017, **Trans Euro Express 94**, with €17,795,903, 2% more than in 2017, and **Ravitex**, with €17,593,808, 1% more than in 2017. Thus, out of the companies in ►





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► Top 20 in terms of assets, 15 registered increases compared to 2017, ranging from 1% to 54%, and five decreased by 1% to 19%.

## The difference between receivables and debt is slightly higher than in 2017 for the Top 20

The first 20 transport companies in the ranking that takes into account the difference between receivables and debts have in total €46,510,285, compared to €39,997,007 the first 20 companies in 2017. 13 of the first 20 operators in this top in 2018 appear in the Top 20 in 2017, and seven are new entries in Top 20, which means, of course, that seven companies from 2017 no longer appear in the 2018 top: Vos Logistics, Trans Bitum, Wiedmann & Winz International Shipping, Lubbers, Anasped, Transconstruct Co. Snagov and Hagero.

The leader of this ranking is, as in 2017, **Duvenbeck**, with €8,767,794, 8% above the €8,105,697 in 2017, followed by **Skiptrans**,

with €4,498,328, 285% more than the €1,168,498 in 2017, when he was 16<sup>th</sup>, and **Carpat Cemtrans**, with €3,368,315, 28% less than the €4,685,129 in 2017, when it ranked second. **Vectra Logistic**, in fourth place in 2018, has dropped a position compared to 2017, although the difference between receivables and debts increased by 3%, from €2,510,166 to €2,573,800. **Hartl Carrier** climbed three places, up to the fifth, due to a 50% increase, from €1,713,317 to €2,562,894.

**Felbermayr** follows in this ranking, with €2,492,252, up 2% compared to 2017, when it was in fourth place, then **Kenwroth Transport**, with €2,486,507, 15% above the value in 2017, when it was on fifth place, **Van Miegheem Transport**, with €2,317,353, 17% more than in the previous year, when it was on the sixth place, **Cat-Ion**, with €2,115,845, 61% above the value of 2017, and **Microfruits**, in 10<sup>th</sup> place, with €1,753,612, 136% more than in 2017, when it was not in Top 20.

In the second part of the standings, the 11<sup>th</sup> place belongs to **Vio Transgrup**, with

No.	Company	County	Claims-debts (EUR)		Difference 2018-2017 (EUR)	Claims-debts (EUR)		Average no. of employees
			2018	2017		2018	2017	
1	DUVENBECK LOGISTIK	BRASOV	8,767,794	8,105,697	662,097	7,415,660	5,899,290	
2	SKIPTRANS	CLUJ	4,498,328	1,168,498	3,329,829	2,230,474	3,663,059	751
3	CARPAT CEMTRANS	BUCHAREST	3,368,315	4,685,129	-1,316,815	4,436,929	4,065,474	72
4	VECTRA LOGISTIC	BRASOV	2,573,800	2,510,166	63,634	1,312,139	1,236,405	152
5	HARTL CARRIER	TIMIS	2,562,894	1,713,317	849,577	2,651,026	1,989,881	42
6	FELBERMAYR ROMANIA	ILFOV	2,492,252	2,445,555	46,696	2,031,448	3,038,422	127
7	KENWROTH TRANSPORT	MARAMURES	2,486,507	2,171,481	315,026	1,505,318	1,238,702	46
8	VAN MIEGHEEM TRANSPORT	ARAD	2,317,353	1,985,422	331,931	2,118,638	1,833,905	31
9	CAT-ION	BACAU	2,115,845	1,314,635	801,210	1,284,659	719,973	10
10	MICROFRUITS	BUCHAREST	1,753,612	744,095	1,009,517	-143,836	-743,918	80
11	VIO TRANSGRUP	DAMBOVITA	1,721,251	1,753,070	-31,819	1,124,647	1,600,293	139
12	CESPED ROMANIA	CLUJ	1,655,508	1,177,107	478,401	304,183	-1,163,813	41
13	ADOMID SPEED	SIBIU	1,648,310	1,266,729	381,581	820,277	-32,163	414
14	KLG TRUCKING	GIURGIU	1,603,639	739,669	863,970	416,004	-128,175	115
15	AQUAKI TRANS	PRAHOVA	1,537,372	333,324	1,204,047	284,475	1,036,312	81
16	K.S.T. VERVOER	MARAMURES	1,388,547	1,195,355	193,192	1,060,684	1,039,035	79
17	RUMARAN	CLUJ	1,318,531	-1,230,248	2,548,779	-1,713,028	-2,575,523	24
18	GAZQUEZ TRANSPORT	BISTRITA-NASAUD	1,303,268	164,531	1,138,736	-189,787	-962,007	0
19	EXPRESS EUROSCAN	SUCEAVA	1,248,556	1,392,222	-143,666	735,858	515,589	145
20	H ESSERS	BIHOR	1,235,515	780,296	455,219	56,020	48,757	611



€1,721,251, 2% less than in 2017, when it was on the seventh place, on the 12<sup>th</sup>, climbing three places compared to 2017, is **Cesped**, with €1,655,508, 41% over the previous year, the 13<sup>th</sup> company, as in 2017, is **Adomin**, with €1,648,310, 30% over the previous year, on the 14<sup>th</sup>, **KLK Trucking**, with €1,603,639, 117% over the value of 2017, and on the 15<sup>th</sup> is **Aguaki Trans**, with €1,537,372, 361% more than in 2017 - the last two companies were not in the Top 20 in 2017.

The ranking ends with **K.S.T. Vervoer**, with €1,388,547, 16% more than in 2017, but dropping two places, **Rumaran**, with €1,318,531, a company that in 2017 had a very negative value, of -1,230,248 euros, **Gazquez Transport**, with €1,303,268, 692% more than in 2017, **Express Euroscan**, with €1,248,556, 10% less than in 2017, when it was in 10<sup>th</sup> place, and **H.Essers**, with €1,235,515, 58% more than in 2017 - the last four companies were not in 2017 in Top 20 realised by the difference between receivables and debts.

## Higher degree of capitalization and high return on equity

Confidas platform made an analysis of the road transport market in Romania, where 34,600 companies operate, which filled a balance sheet, but many of them are inactive or have only 1-3 trucks, so the analysis took into account only those with more than 100,000 lei turnover. And the conclusion was that it increased in 2018 by 12% compared to 2017, from 41.6 to 46.6 billion lei total turnover, after the 13-14% increase in 2017 compared to 2016. The first 50 companies in terms of turnover represent 20% of the entire industry, and the average turnover/firm is €250,000. 62% of the operators in this field registered an increase in revenues in 2018, the degree of capitalization increased, but not too much,

from 16% to 18%, proving the long-term commitment and the confidence of the financiers, and the value of the return of the own capital remains high, 32%, although down from 35% in 2017.

The number of employees in this industry was 147,000 at the end of last year, compared to 135,000 in 2017, which means an average of six employees/firm, given that 54% of the companies had an increase in the number of employees last year.

70% of the active companies have profit, and the average duration of debt collection has decreased from 75 to 74 days.

## 56% of the transport companies have medium and high risk of insolvency

If above we have the strengths of the transport industry, the vulnerabilities identified by Confidas analysis include the fact that 46% of the companies have a debt level of more than 80%, the debts being close to or greater than their own capital, that 37% have a liquidation current below 1, which indicates liquidity pressures, that 63% of the debts are current liabilities, and 45% of the firms have only short-term debts, which shows a financing horizon focused mainly on short-term (long-term orientation would mean investments in order to have future returns). In addition, 60% of the companies recorded a decrease in net profit in 2018, from 6.5% to 5.5%, the payment terms to suppliers increased from 109 to 110 days, and 56% of the companies have the risk insolvency, **Confirisk**, above the average risk, which is 1-6 - the average in transport is 6.12 out of 10. The lowest average insolvency risk in Romania, 9.40%, is held by the companies from Tulcea, followed by those from Iași (10.60%) and Vaslui (10.90%), and the highest is in Bucharest and Ilfov (27%), followed by Caraș Severin, with 25.30% and Timiș, with 23.20%. ■

No.	County	Company	Fleet 2015	Evolution 2015-2016	Fleet 2016
1	CJ	CARRION EXPEDITION	876	-484	1,320
2	CJ	SKIFTRANS	611	143	468
3	GL	ARABESQUE TRANSILVANIA GENERAL IMPORT EXPORT	574	-22	596
4	BH	DUNCA EXPEDITII	403	-24	437
5	TM	H EGGERS	367	-67	434
6	BH	INTERNATIONAL ALEXANDRE	349	2	347
7	AR	DOLO TRANS OLIMPIA	348	23	327
8	AG	AQUILA PART PROD COM	340	23	317
9	PH	INTERNATIONAL LAZAR COMPANY	339	-101	440
10	AG	ROMSTYL IMPEX	314	15	299
11	DB	MICA TRUCKING	310	5	301
12	TM	TIMISOARA	309	5	300
13	AG	DIANTHUS COMPANY	308	0	308
14	B	TRANSPICO LOGISTICS & DISTRIBUTION	293	19	276
15	TM	GARTNER EUROTRANS ROMANIA	287	-4	291
16	SB	TOTAL NSA	289	-10	279
17	BC	DODMAN TRUCK ROM	281	12	249
18	B	INTERNATIONAL	255	67	188
19	BV	DUVNBECK LOGISTIK	245	-15	260
20	B	RAN COURIER EXPRESS	240	4	236
21	CJ	BALADEI THIRWAY TRANSPORT	227	-2	229
22	B	FRACICOM	227	-33	280
23	AG	AGEXIM SFECTION	223	36	169
24	AR	RUP	214	27	187
25	BH	RAVITEX	213	-3	216
26	AR	XPO TRANSPORT SOLUTIONS ROMANIA	212	-174	387
27	B	TRANS EURO EXPRESS 94	211	20	191
28	DB	DUMAGAS TRANSPORT	208	26	182
29	IS	HTE SFECTION	205	103	100
30	B	BRKANIN LOGISTICS EURO FLEET	200	1	199
31	CJ	TRANSPORTS	194	-30	224
32	CJ	ARCESE TRANSPORT	194	-29	223
33	AG	COM DIVERS AUTO RO	183	-23	206
34	PH	BINAR SPEED EXCLUSIVE	181	40	141
35	IS	AVIS TRANS	179	-2	181
36	TM	CARRON LOGISTIC	179	14	165
37	CJ	LOGISTIC & VAN WIJK	178	-6	184
38	BH	TRANSSEC RO	176	7	169
39	AG	EUROPEAN LOGISTICS	169	-3	172
40	AR	SPEED LINE IMPEX	168	10	158
41	TM	PARTUD	161	-4	165
42	AR	LIAR	156	31	125
43	CJ	VOS LOGISTICS CARGO	154	113	41
44	SB	GALEX	154	-26	190
45	CL	STEP ONE SFECTION	152	13	139
46	TM	HARTL CARRIER	143	-25	170
47	BH	MARVICON	143	70	73
48	AG	SUTON-TRANS	141	-20	161
49	IF	TRIFRO	139	-1	140
50	SB	BRAICATA OYL COMPANY HOLDING AG.	137	62	55
51	IL		135	19	116

No.	County	Company	Fleet 2015	Evolution 2015-2016	Fleet 2016
52	CV	INT-TRANSPORTS POPOVICI	135	0	135
53	AR	CDC TRANSPORT INNOVATIONS	135	-4	139
54	AR	LAGERMAX AUTOTRANSPORT	131	-8	139
55	PH	J. CHRISTOP & S SERVICES	129	79	50
56	BV	VACTRA INTERNATIONAL	129	-8	137
57	NT	DANLIN XXL	126	27	99
58	B	INTER LOGISTIC SFECTION	124		-
59	CJ	TRANS SISR	123	-1	124
60	CF	KLG TRUCKING	122	29	93
61	TM	MARICANA	121	42	79
62	CJ	PLITEXIM COM	119	4	111
63	BV	EXPRESS EUROSCAN	112	2	111
64	BH	DOPU SI FLOREN	112	22	90
65	PH	CARTENS FREDA	112	-16	128
66	SM	HENRIK HANSEN	111	-66	177
67	SB	LOGISTICS RO TIF	110	-11	121
68	AB	OFFRAN	108	-15	123
69	BC	RAD-TRANS	108	-1	109
70	BZ	LUSCAN COM	107	-4	111
71	AR	ICIRUAL 2002	104	2	102
72	BC	SOMA	104	11	93
73	SJ	AUTOVEST TRANS	103	-2	106
74	PH	TRANSCOM	102	-8	110
75	TM	TERRAVIA	102	-10	112
76	AB	TRANSVIA	100	9	91
77	BV	ARABA GROUP	100	13	87
78	BH	GRUBER LOGISTICS	99	8	91
79	AG	SEMIRAMIS	98	-20	118
80	AG	HODOLMAYR-LAZAR ROMANIA	98	-10	108
81	IF	URGENT CARGUS	98	11	87
82	AR	POLACH LOGISTICS & TRANSPORT	97	-11	108
83	B	GOOD SOLUTIONS	96	-40	136
84	B	DISSEGNA LOGISTICS ROMANIA	94	-6	100
85	BH	SON-TRANS	94	13	79
86	BH	LANCETTI TRANSPORT	94	6	88
87	BN	AGUAVIVA	94	0	94
88	B	BLUE RIVER BUCURESTI 78	92	11	81
89	TM	MVT LOGISTIK	91	-2	93
90	CJ	HISTERKAMP TRANSPORT ROMANIA	89	-4	93
91	MS	KRAFT LOGISTIC	87	-40	127
92	BN	DIMEX-2000 COMPANY	87	7	80
93	TM	TIF EXPRESS	87	-22	109
94	SM	GRD SPEED	86	3	81
95	CL	IMPALA C.D. FILTRAN	86		-
96	TM	SABIKO-IMPEX	85	12	73
97	B	ACTIV GROUP MANAGEMENT	85	63	22
98	IS	REY-SAM	84	4	80
99	AG	TITANIC GRUP	84	17	67
100	SB	IGNITE LOGISTIC	83	14	69

Source: Romanian Road Transport Authority



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### HERMES FORWARDS

Hermes Forwards is a company with 100% Romanian capital. The company was founded in 2012 by a group of 10 colleagues aiming to become an important player in a market with great growing potential. Nowadays, the company has 30 employees in 3 field offices in the country. From the beginning the turnover has registered a constant growth from 1 million RON in 2012 to a value of 53 million RON by the end of 2018. Hermes Forwards team is quick and adaptive in decision process; its clients will find in them a reliable partner for both, big volumes and innovative solutions for time sensitive projects. The company develops a direct relationship with its suppliers, and its position on the market lays in their long term stability. The key of its success lays in the team, inspired by Henry Ford's motto: Coming together is the beginning. Keeping together is progress. Working together is success. A company can maintain a healthy position in the market by respecting all its stakeholders, clients and suppliers.

Capital of the company	RON 10,000
Owners / Shares	100% Romanian capital
Clients names or fields of activity	FMCG, Automotive, Logistics, Retailers
Turnover 2018 / Estimation for 2019	RON 53,000,000 / RON 60,000,000
Profitability rate (Profit/turnover) in 2018 / Estimation for 2019	RON 2,000,000 / RON 2,500,000
Number of employees	30
Locations	Bucharest, Miercurea Ciuc, Deva

## Top 25 Global Freight Forwarders

# Good profits, but smaller volumes for ocean and air transport

The global forwarding market achieved good financial gains in 2018 and the main players continued to invest in network and operations optimization, but the volumes declined for ocean and air transport. DHL Global Freight Forwarding is the main player in this field, as we may see in Armstrong & Associates Inc's rankings, but a lot of analysts believe that Kuehne + Nagel surpassed DHL as the leader in this market, because in 2018 this company achieved an 11.7% increase in net turnover, 9.8% in gross profits and 5.3% in EBIT. Its ocean volumes increased by 7.7%, air increased by 11% and the company also made significant investments in technologies and acquisitions.

Rank	Provider	Gross Revenue (US\$ Millions)*	Ocean (TEUs)	Air (Metric Tons)
1	DHL Supply Chain & Global Forwarding	28,120	3,225,000	2,150,000
1	Kuehne + Nagel	25,320	4,690,000	1,743,000
2	DB Schenker	19,968	2,203,000	1,304,000
3	DSV	12,411	1,442,348	689,045
4	Sinobrans	10,549	3,740,000	530,100
5	Expeditors	8,138	1,167,820	1,011,563
6	Panalpina	6,156	1,484,100	1,038,700
7	Nippon Express	18,781	686,206	899,116
8	UPS Supply Chain Solutions	9,814	600,000	935,300
8	Bolloré Logistics	5,415	873,000	690,000
9	C.H. Robinson	16,631	1,000,000	225,000
10	CEVA Logistics	7,356	786,600	476,600
11	Kerry Logistics	4,875	1,196,607	409,127
12	GEODIS	6,645	798,173	363,451
13	Hellmann Worldwide Logistics	3,646	901,698	578,007
14	Kinbotu World Express	5,310	700,043	600,849
15	Yusen Logistics/NYK Logistics	4,715	815,000	380,000
16	Agility	4,400	710,000	415,000
16	DACHSER	7,602	536,900**	344,900
17	Hitachi Transport System	6,283	532,000	300,000
18	Damco/Maersk Logistics	6,082	639,132	175,502
19	Toll Group	5,980	503,400	106,600
20	XPO Logistics	10,850	131,500	72,600
21	Logwin	1,346	600,000	180,000
22	Mainfreight	2,038	342,741	127,418

\* Revenues and volumes are company reported or Armstrong & Associates, Inc. estimates. Revenues have been converted to US\$ using the average annual exchange rate in order to make non-currency related growth comparisons. Freight forwarders are ranked using a combined overall average based on their individual rankings for gross revenue, ocean TEUs and air metric tons.  
 \*\*Includes LCL shipments.  
 (Source: Armstrong & Associates, Inc; updated October 9, 2019)

The ranking is flexible in its final part and there may be more room for new players to enter the rankings, since CJ Logistics and NNR Global Logistics fell off the list in 2018 and were replaced by Logwin and Mainfreight.

The freight forwarding market is concentrating more on the small-to medium-sized business segments. For example, Agility has introduced online platforms and other services to focus on this growing segment, UPS and FedEx have introduced fulfillment services and Amazon is playing a bigger role in attracting more third-party sellers to its platform by offering logistics and freight forwarding services. And niche solution providers, such as perishables and



healthcare, are expected to attract forwarders looking to expand their industry specific services.

Since this ranking appeared, Kuehne + Nagel has expanded its overland capabilities with the acquisition of Austrian SME Jöbstl, a move that would benefit shippers seeking capacity into Eastern Europe and groupage services. Transport operations, especially the connections to neighbouring countries, will be strengthened, while increasing the frequency of departures and shortening lead-times, as the representatives of Kuehne + Nagel declare.

DSV purchased Panalpina in May 2019 and the new entity became the world's 3<sup>rd</sup> largest forwarder by revenue and the 4<sup>th</sup> on the Armstrong & Associates Inc's rankings and a rival for industry leaders Kuehne+Nagel and DHL Global Forwarding, with a turnover of 118 billion Danish krone (1 DKK = 0,13 euro) and around 60,000 employees in 90 countries.

Another impressive leap was made by C.H. Robinson, from 13<sup>th</sup> in 2017 to 9<sup>th</sup> in 2018, due especially to a high demand for ocean cargo - a very strong sector for this company. ■

**6<sup>th</sup> of November 2020**

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Hotel Grand Italia,  
Cluj-Napoca

**EVENTS 2020**

**tranzit**

**10<sup>th</sup>  
of  
April  
2020**

Tranzit East  
conference,  
Suceava,  
Hotel  
Mandachi

**18<sup>th</sup>  
of March  
2020**

Tranzit  
conference,  
Bucharest,  
Hotel Ramada

**14<sup>th</sup>-15<sup>th</sup>  
of May 2020**

EXPO Tranzit,  
Hotel Grand Italia,  
Cluj-Napoca

### Three regions managed to exceed the one billion thresholds in transport. Logistics seems less profitable.

The top 500 companies in transport and logistics sector were divided into six development regions according to the county. Not surprisingly, the same regions that had the best result in transport, performed well also in logistics sector, but only less profitable. Muntenia, Transylvania and Maramureş, Banat and Crişana are the regions with the highest turnover, over one billion from transport services. The turnover for Moldavia, Oltenia and Dobrogea is lower. In transport sector, Muntenia region is followed by Transylvania and Maramureş from turnover point of view, and Banat and Crişana region comes on third position. Regarding the logistics sector, Muntenia maintains first position, but Banat and Crişana region is the second runner-up, thus Transylvania ranks the third position.

According to the data provided by Coface, there are 31,437 companies activating in transport sector (CAEN Code 4941), around 2% of the total number of economic agents in Romania. Out of this number 5,682 had no financial activity in 2018. All transport companies reported a turnover of almost RON 45.794 billion (around €9.85 billion) for 2018. 14,924 companies reported a turnover in the range €0-100,000, meaning half of the total agents on the market. 7,741 economic agents had a turnover ranging from €100,000 up to €500,000, only 1,550 companies went up to one million and 1,284 agents had a turnover fitting between €1 and €1.5 million.

As the turnover goes higher, there is a drop of the number of companies ranging in that class. So, there are only 140 companies that managed to accumulate a turnover of €5-10 million and 109 companies fitted in the range of €10-50 million. Five companies had a turnover of €50-100 million, and only two companies managed to exceed the €100 million threshold.

The top 10 transport companies provided 8% of the cumulative turnover of the sector, meaning RON 3.666 billion (approximately €788.28 million).

Regarding the logistics sector, also according to Coface, there are 1,701 economic agents and out of these 297 had no

activity in 2018. 535 companies accumulated a turnover below €100,000. 433 agents reported a turnover of €100,000-500,000 and there were 156 companies in the range €500,000-1,000,000. A few more companies, namely 212, registered a turnover in the range €1-5 million and 33 agents fit in the range €5-10 million.

28 companies managed to record a turnover of €10-50 million. 6 of the agents activating in the sector went from €50 million up to €100 million and only one managed to exceed €100 million.

The total turnover of the logistics sector (CAEN Code 5229 - Other activities related to transport) was of approximately RON 9.840 billion (€2.116 billion) and almost one third of this turnover - 32% - was the contribution of the first 10 companies (€673.69 million).



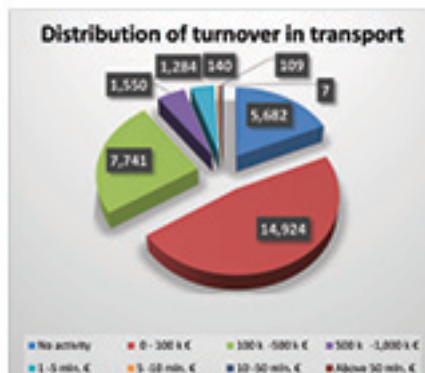


Regarding the development regions, although comparable from turnover point of view, the profit accumulated by the companies activating in Muntenia was higher compared to Transylvania, one of the reasons being the fact that the latter region is populated with local subsidiaries of important multinationals. In the Southern area of Romania transport services are supplemented by logistics services and, very important, there are many Romanian capital transport operators who do not repatriate any profit elsewhere. These companies are also the ones that have the biggest assets on the market of transport and logistics.

Muntenia Region - consisting of Argeş, Teleorman, Giurgiu, Dâmboviţa, Prahova, Ilfov, Calăraşi, Ialomiţa, Buzău, Brăila counties and Bucharest - counts 149 transport companies present in Top 500. These companies registered a €1.59 billion turnover; almost half was the contribution of the first 20 companies. 13% of the total turnover was reported by Aquila Part Prod Com. 15 companies out of 149 recorded losses in 2018.

The profit reported by the remaining 134 companies reached €62.66 million in 2018 (up from €59.36 million in 2017). Only 16 transport operators managed to cross the one million euro profit threshold.

226 companies in top 500 logistics operators are from Muntenia region. These operators have reported a turnover of €1.39 billion for 2018 (€1.3 billion in 2017), more than half of the total turnover of the top 500 (€2.17 billion). 29 operators have reported losses for the financial year 2018. The remaining 197 operators have had a profit of €49.24 million, decreasing from €49.94 million. Almost €30 million was the contribution of the companies ranking the first 20 positions.



Although Muntenia enjoys the presence of most multinational logistics operator, it seems that transport companies are more profitable, with an average profit of half million euro per company, compared to a quarter of a million, the profitability per each logistic operator.

## Transport offers better profitability for companies in Transylvania and Maramureş

Almost one third of the companies in top 500 come from the counties belonging to Transylvania and Maramureş region - Braşov, Covasna, Harghita, Mureş, Salaj, Hunedoara, Sibiu, Alba, Bistriţa-Năsăud, Cluj, Maramureş and Satu Mare - namely 158. These reported for 2018 a turnover of €1.54 billion compared to €1.41 billion in 2017.

In top 20, there are 11 companies from Cluj County. Carrion Expedition, one of the most important presences in the region in the past, didn't report the financial data at the Ministry of Public Finance. Without Carrion, all 158 companies in this region registered in 2018 a profit of €40.63 million compared to €39.87 million in 2017.

87 companies from Transylvania and Maramureş are present in top 500 logistics operators. Their cumulative turnover reached ▶



► €176.47 million. 62.72% (€121.27 million) was the contribution of the first 20 operators.

Atlas Imobiliare ranks first both as turnover (€27.75 million) and profit (€1.45 million) point of view. It was actually the only company that managed to exceed the 1 million euro profit threshold, offering also 20% of the entire profit of the companies that got into top 500. Only 73 of these companies reported a profit of €7.38 million and 14 operators reported negative results.

## One fifth of the transport and logistics operators in top 500 are from Banat and Crişana region

In top 500, one fifth of the ranking is represented by the companies from Banat and Crişana Region - Arad, Bihor, Timiş, Caraş-Severin - exactly 109 operators. These companies reported a turnover of €1.19 billion for 2018 compared to €1.03 billion recorded the previous year. Half of this turnover is the contribution of the companies ranking the first 20 positions. There was no company from Caraş-Severin County to rank in top 20. By the way, there are only three companies from Caraş-Severin present in top 500 (Mercur International, Liverani and Res Vipiteno Logistica, with a turnover around €5 million. These 109 companies had a profit of €29.22 million, decreasing from €31.87 million in 2017.

99 companies from Banat and Crişana region represent the logistics sector in top 500. Their turnover reached €420.18 million in 2018, increasing from €400.70 million in 2017. €322.92 million was the contribution of the operators ranking top 20, meaning 76.85% of the turnover registered by the operators present in top 500. 20% of the cumulative turnover was the contribution of Transmec Ro (€85.12 million), the company that ranked first also from profit point of view with €2.34 million, meaning 17.94% of the total profit of €13.08 million reported by 81

companies from this region. 18 operators reported negative results.

## Moldova offers better ground for transport

In Top 500 transport companies analysed by Tranzit magazine from financial performance point of view, from Moldavia region, consisting of Iaşi, Botoşani, Neamţ, Suceava, Bacău, Vaslui, Vrancea and Galaţi counties, there were 53 companies. These companies recorded in 2018 a turnover of €348.47 million, showing a 24% growth compared to the situation in 2017 (€263.60 million).

More than half of this value, €212.07 million, represents the contribution of the first 20 companies from the counties mentioned above. Suceava and Iaşi are the leads with six companies for each county present in this ranking.

Out of 53 companies from Moldavia, only 49 registered profit in 2018, the total value of their profit being €10.497 million. Moldova region profit declined slightly from €10.97 million registered in 2017. The top 20 companies in the region accumulated a profit of €8.8 million. Express Euroscan was the only company with a profit exceeding one million euro, according to the financial data from Ministry of Public Finance.

Out of 500 logistics operators analysed by Tranzit, only 25 are from Moldavia region, and they managed to reach a €60.76 million turnover last year. 3 companies (out of 25)





were on loss. The others 23 reached a profit of €2.15 million, decreasing slightly from €2.37 million in 2017.

Orient runs the top both form turnover (€21.98 million)

and profit (€542,610) point of view. So, taking into account the turnover and profit of the companies activating in transport and logistics in this region, it seems Moldavia offers a better climate for transport. At least for the moment, because in the last two years most of the national forwarders and logistics operators consider Bacău, Roman or Iași as hubs of the region for a cross-dock center.

## Oltenia was better represented by transport

Oltenia Region comprises five counties: Gorj, Dolj, Olt and Vâlcea, but only 17 companies made it to the TOP 500, with a cumulative turnover of €112.85 million (€103.40 million in 2017). Mehedinți County is also part of this region, but no company has made to the 500 ranking. One third of the turnover was the contribution of Dumagas Transport (€35.77 million). Only 16 companies out of 17 present in top 500 managed to record profit. The profit was about €3.52 million in 2018, slightly decreasing compared to €3.90 million reported for 2017.

19 logistics operators in Oltenia have entered the top 500, with a cumulative turnover of €36.35 million, €9.09 million being the contribution of Marvi Logistic, the company ranking the first position from the turnover point of view. All the companies from Oltenia have accumulated in 2018 a profit



of €2.73 million (€2.24 million in 2018).

## Tulcea offers little perspectives for transport and logistics operators

Dobrogea Region, consisting of Constanța and Tulcea counties, had only nine companies present in top 500. These reported a turnover of €80.37 million compared to €59.54 in 2017. BKN TIR LINE is the only presence form Tulcea. On the other hand, J.T. GRUP OIL managed to offer 45% of the total turnover.

The profit registered by these companies increased from €2.46 million in 2017 to €3.2 million in 2018.

Dobrogea enjoys the presence of 33 logistics operators in top 500, all of them being from Constanța. Their turnover reached €72.54 million in 2018 (from €70.32 million in 2017). Aries Logistics offered 19.11% (€13.86 million) of the total turnover of the region.

Only 30 companies reported profit in 2018, approximately €5.9 million, increasing from €5.3 million in 2017.

The results are very poor taking into account that Constanța is one of the largest harbours in region and should have offered more opportunities for development at least for logistics. On the contrary, we see that the top transport companies in the region developed more due to the transport activity inside EU community.



# Romania's industrial market is likely to stay hot in 2020 by riding a wave of demand

The industrial and logistics market in Romania is currently enjoying its best period in history, both in terms of supply and demand, doubling its total stock during the past five years, according to the data provided by real estate consultancy companies reports. Industrial market reached highs that led more developers to get into the game. At the end of the third quarter of 2019, the stock of A and B class industrial spaces reached 4.3 million sq.m.

**T**he H1 2019 property investment volume for Romania is estimated at almost €338 million, a value almost 64% higher than the one registered in the same period in 2017 (€205 million). However, there are a number of transactions in different stages of negotiations that will most likely be concluded during the remainder of 2019 or 2020.

The macro-economic forecast for Romania continues to be positive, despite some recent concerns. The country was one of the EU's top performer in 2018 (with GDP growth estimated at 4.1%) and it is expected to continue its positive evolution in 2019 as well, with GDP increase forecast at over 4.0%. On the financing side, terms and conditions are getting closer to what can be expected in the core CEE markets. Consequently, the market feeling is strong, with a total volume for 2019 estimated to surpass the €1.2 billion milestone.

The most important industrial transaction was the acquisition of a logistic park on the A1 Highway, at the kilometre 13, the most important sub-market in Bucharest. Bought by CTP from Vabeld Group for approximately €40 million, the deal consolidated the

position of CTP as one of the largest owners of industrial/logistic space in Romania. The developer already owns other three properties in the vicinity of Bucharest. The transaction was concluded in June 2019.

For 2019, many new projects were announced on the industrial and logistics segment, for example ELI Park 1 Chitila, MLP Bucharest West, Global Logistics Chitila, Black Sea Vision Constanța, ONE Ploiești Logistic Park, P3 Bucharest NW Ring Road, CTPark Sibiu II, WDP Buzău, TRC Park Bacău etc.

To these new projects there were added extensions of existing parks, and „here we can mention CTPark Bucharest West, WDP Ștefănești, WDP Dragomirești, P3 Bucharest A1, Global Logistics Timișoara (former TAP), Network Industrial Park Sibiu, Southern Industrial Park Craiova, Olympian Park East Bucharest, Olympian Park Brașov, NGB Distribution Center Bragadiru etc.”, explained Costin Bănică, head of Industrial Department





JLL Romania. Most of the spaces are made on request.

## Romania doubled its industrial stock in half a decade

The industrial and logistics market in Romania doubled its total stock during the past five years.

The stock of A and B class industrial spaces reached 4.3 million sq.m at the end of the first nine months of 2019, following the July-September period, when approximately 186,000 sq.m were completed in 11 industrial projects. According to CBRE Research data, an additional area of 75,000 sq.m of industrial space will be delivered in seven projects by the end of the year, of which about 72% has already been pre-rented.

Bucharest currently has a stock of industrial and logistics spaces of around 1.8 million sq.m, with a share of 50% in the total national stock, the capital city being followed by Timișoara (500,000 sq.m), Ploiești (350,000 sq.m), Cluj-Napoca (280,000 sq.m) and Pitești (235,000 sq.m).

In the first six months of 2019, new industrial and logistics spaces with an area of 200,000 sq.m were delivered, with Bucharest accounting for 57% of the total (115,000 sq.m), followed by Slatina (62,000 sq.m), Oradea (34,000 sq.m) and Timișoara, with almost 22,300 sq.m traded.

With respect to the second part of the year, new projects totalling 300,000 sq.m are expected, developers thus maintaining the impressive expansion rate that has been the main characteristic of the industrial and logistics market during the last five years.

"The first semester of 2019 has been a dynamic one in terms of leasing transactions of industrial and logistics spaces, totalling 235,000 sq.m. Bucharest remains the most attractive location, both in terms of total stock and the transactions concluded. We have

also noticed that important transactions were closed in Slatina, where Pirelli will expand its production area by 62,000 sq.m, and in Oradea, a city where the supplier of auto components Sogefi will expand its activity. These transactions highlight both the potential of such cities that were not among the top destinations sought after by major developers and tenants and also of the market in general, this positive trend being expected to continue in the coming years", said Rodica Târcavu, Partner, Industrial Agency, Cushman & Wakefield Echinox.

Given the developments in the first half of the year, JLL's expectations for 2019 demand are optimistic, so there is expected a volume of transactions comparable to the one recorded over the past 3 years, around 500,000 sq.m.

"But we have to consider two aspects that can influence the level of demand. The first is that the industrial market has reported a record take-up over the last three years, especially amid the expansion of retailers and logistics. The second element is that most of the logistics companies have already consolidated their operations to meet the increased volume of goods generated by the rise in consumption in recent years", explained Costin Bănică.

However, there might be an increase in demand for manufacturing and industrial premises, especially from companies active in the automotive sector. Noteworthy that over H1 2019 more than half of the demand (121,600 sq.m) came from manufacturing companies, most of them in the automotive field. "The automotive sector is experiencing a transition to the production of components for electric vehicles. Romania could take advantage of this transition and could attract major investments from big companies for this kind of production premises. In this context, we anticipate an increase in the demand for production areas in 2020-2022", added Costin Bănică.

## ► Tenants migrate from old industrial platform to modern projects

According to JLL Romania, another trend seen on the market in 2019 and which generates part of the demand is the migration of the companies from the spaces they are occupying on former industrial platforms to modern projects.

"We are seeing a growing interest from developers to build smaller projects of 1,500-3,000 sq.m, willing to accommodate rising demand from companies moving their operations from old industrial platforms to modern industrial projects. This migration is based, on one hand, on the desire of companies to provide employees with better working conditions and, on the other hand, it is determined by the stricter regulations related to the fire safety authorization", added Costin Bănică.

Railway and port accessibility make Romania a great destination for Asian companies which are looking for a better European presence, and our country has a very good connection with the West, Dunwell specialists reveal. "We had meetings with several Asian companies - from India to big business centres such as Hong-Kong or Shanghai - all of them interested in investing in Romania, due to its great connection to railway and sea transportation means. Constanța could become an important business hub for such investors in the coming years, mainly from Asian companies who aim for a more significant presence in Europe", said Daniel Cautis, managing partner Dunwell.

## Industrial market is driven by three emerging trends

Three trends connect 2018, 2019 and 2020. E-commerce and inner city logistics continue to gain ground. New developers (local and international) have joined the competition

and exploring new locations has become a must.

Supply growth went up by 30% year-to-year, which takes us to a total of roughly 3.5 million sq.m by the end of 2018. Market leader CTP advanced with 60% of all new supply, while WDP was number one in terms of new preleases.

WDP will expand the existing production facility of automotive tyre producer Pirelli, with a newly built state-of-the-art warehouse spanning approximately 62,000 sq.m. After completion, scheduled for the second quarter of 2020, Pirelli will lease the new logistics facility for a fixed term of fifteen years. The investment budget amounts to around €40 million. The site in Păulești is underway for a new distribution centre for Iron Mountain, measuring around 10,500 sq.m, with phased delivery by the fourth quarter of 2021. Iron Mountain will lease the premises for a twelve-year term. The investment budget for WDP comes to approximately €4.5 million. Telecom provider Toya will move into a new distribution centre of about 8,600 sq.m under a long-term ten-year lease in WDP Ștefănești de Jos. The developer projects an investment of €3.5 million. Located in the Western part of the country in Oradea, WDP will build and lease a new warehouse of around 34,000 sq.m for the automotive supplier Sogefi, under a fifteen-year lease. WDP projects an investment budget of around €16 million.

P3 also announced their second industrial park near A1 highway, in the North-Western part of the ring road. VGP and Zăcăria were active as well in the region of Timișoara, Brașov, Sibiu and Craiova.

Year	Project	Tenant	Leased surface sq.m
2018	WDP Ștefănești	Auchan	77,500
2018	WDP Ștefănești	Metro	56,500
2018	WDP Deva	Carrefour	44,000
2018	WDP Brazi	Carrefour	32,500
2018	WDP Timișoara	P&G	30,100

Source: JLL Research





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► VGP has constructed 111,000 sq.m in Timișoara and other 16,000 sq.m in VGP Park Sibiu.

The initial VDP park in Sibiu is divided into 3 buildings. The middle one is fully constructed and it has a total surface of 16,000 sq.m, and approximately 3,000 sq.m were leased by Engelmayer. The total VGP Park Sibiu will have 44,000 sq.m with possibility of further extension.

As a novelty, P3 has launched a multifunctional project that includes a 212-bed hostel, with the possibility of extension, for temporary or permanent employees and a canteen. The building is located in the center of the logistics park and P3 has the possibility to add other service components in the future. The developer is thinking also of a supermarket, cafe and medical services. With this project the company tried to meet the urgent need of labour force of its tenants. The tenants spend a lot on the transport of the workers who are brought from distances up to 800 km. The market is growing up; and the professional players came up with new approaches. In this business, it is a must to continue to address the demands of customers who, in turn, are changing. The market is dynamic and there are a lot of factors involved in the way customers run their business. P3 considers it is not just a building, but an eco-system where customers can run their business, with everything they need: public transportation, intermodal activities etc.

## Demand came close to 0.7 million sq.m in 2018

Bucharest stays in top when it comes to new deliveries, followed by South-Central and Western submarkets: Pitești, Timișoara,

Year	Project	Tenant	Leased surface sq.m
2019	WDP Slatina	Pirelli	62,000
2019	WDP Oradea	Sogefi	34,000
2019	Equest	Honeywell Garrett	17,000
2019	P3 Bucharest	Urgent Cargus	16,000
2019	CTP Bucharest West	Michelin	15,000

Source: JLL Research

Sibiu, Craiova, Ploiești and Brașov. Due to the improved infrastructure of the ring road new tenants were driven to the

Northern part of Bucharest, where the connections of the A3 highway was finalized.

Demand came close to 0.7 million sq.m in 2018, where only 22.5% were renewals and renegotiations, most transactions being concluded for new premises. 24% of the total number of transactions was sealed by logistics companies, the demand being concentrated in Bucharest (60%), with Timișoara coming in second (9%) and Deva in third (8%). Retailers represent 42% of all market transactions, while eMAG decided to build its own 120,000 sq.m premises.

2018 closed with a 5% vacancy rate in Bucharest and only slightly higher in the rest of the country.

Average headline rent in Bucharest and neighboring area stands at €3.5-4.1/sq.m and €3.3-4.1/sq.m in the regional cities. „We do not expect significant changes for 2020“, added Costin Bănică.

But competitive rent levels, more flexibility or incentives were expected to characterize the 2019 leasing market.

The supply could expand by an additional 750,000 sq.m in 2019, 41% being under construction at the beginning of the year, and 35% of the area was located in Bucharest, where major A Class projects were about to rise from new developers such as MLP Group, Element Industrial or Global Vision.

We are likely to witness new projects appearing in Craiova, Constanța, Buzău, Bacău and even Iași, as we expect to see more activity in these places in the following years. ■



## About SLS Cargo

**SLS Cargo** is a freight forwarding company which started the activity in 2014 opening its first office in Bucharest. In 2015, **SLS CARGO** is expanding its activity through 2 new offices in Radauti and Constanta followed by opening the first warehouse **SLS CARGO** in Bucharest in 2016.

In 2017 SLS team is increasing and also that year marked the opening of Buftea rail terminal exclusively operated by **SLS CARGO**.

Fast growing activity from local market encouraged **SLS CARGO** to cross border in 2018 and to open first offices in Bulgaria and Italy, as well signing new global partnerships.

To enhance the quality of the services offered, **SLS CARGO** has obtained ISO 9001, ISO 14001, ISO 22000 (HACCP) certifications and is a member of FIATA and IATA.

In 2019, **SLS CARGO** consolidated its position as an important player in the transport and logistics services market by



operating 25,000 sq.m of warehouse space in four locations from Mogoșoaia, Băcu, Buftea and Cluj, managing its own fleet of trucks and running its transport operations through 7 offices in Romania and 2 international offices, in Bulgaria and Italy.

With a diversified customer portfolio across each industry and a team of 120 employees, **SLS Cargo** has become one of the most dynamic companies in this industry in Romania.

### SLS Cargo SRL

Integral Business Center building, 1<sup>st</sup> Floor,  
1-IA Pipera Blvd, Voluntari City, Ilfov

Phone: +40 31 436 54 71

Fax: +40 31 436 54 71

E-mail: [sls-bucuresti@sls-cargo.com](mailto:sls-bucuresti@sls-cargo.com)

Web: <http://sls-cargo.com/>

## SLS CARGO

The company has been founded in 2014 and the first main activity was freight forwarding services - road & sea

Capital of the company	RON 222,400
Owners / Shares	Mihai Stoica 75%, Morărescu Ioana 25%
Clients names or fields of activity	automotive, FMCG, industrial, agriculture
Turnover 2018 / Estimation for 2019	EUR 11,962,826 / 14,828,933
Profitability rate 2018 / Estimation 2019	1.84% / 1.84%
Evolution of the profitability rate in the last 5 years	1.84% (2018), 3.06% (2017), 2.96% (2016), 6.18% (2015), 62.45% (2014)
Number of employees	120
Fleet of vehicles	15
Total storage surface in Romania	25,000 sq.m
Locations	Buftea, Mogoșoaia, Băcu, Cluj
Specificity	12 m average height of the warehouses, forklift from 1.6 to up to 8 t, VNA forklift (very narrow aisle)
Types of products that can be stored	Food / Non food / white goods
Expansion plans 2020/2019	5,000 sq.m to be added

## AHEAD LOGISTICS

Based in Bucharest, the company started its activity in 2006, as a transport operator with own fleet.

Clients names or fields of activity	RON 17,500
Owners / Shares	Ahead Logistics GMBH 92.5%, Mircea Mănescu 7.5%
Clients and field of activity	retailers, FMCG
Turnover 2018 / Estimation 2019	EUR 8,357,000 / EUR 8,350,000
Profitability rate 2018 / Estimation 2019	EUR 347,000 / EUR 350,000
Evolution of the profitability rate in the last 5 years	6.22% (2014), 5.5% (2015), 7% (2016), 4% (2017), 4% (2018)
Number of employees	110
Fleet of vehicles	47
Total storage surface in Romania	8,400 sq.m
Locations	Dărmănești (Dâmbovița)
Types of products that can be stored	general cargo
Expansion plans 2019/2020	storage expansion

## DGH LOG & SPED

Established in 2010, DGH Log & Sped is currently one of the top players of the local domestic road freight and transport logistics market. It operates in the domestic road freight with 24 to trucks and trailers, benefiting from the exclusivity of a fleet of 180+ trailer assemblies. It provides the clients with complete transport solutions covering the entire country. 90% of the fleet is GPS monitored. With the help of its 1,400 long-term subcontractors and the dynamism of a team of 15 dispatchers, the company operates over 240 FTL on a daily basis. Its customers are both companies with large volumes of cargo to carry on a daily business-allocation procedure, but also small volume companies with on-the-spot transport needs.

Capital of the company	RON 258,710
Owners / Shares	Nicoleta Milea 5%, Dragos Ghiță 95%
Clients names or fields of activity	FMCG, Construction Materials, Agriculture, Retail, Automotive, DIY
Number of employees	45
Turnover 2018 / Estimation 2019	RON 74,847,073 / RON 85,500,000
Profitability rate 2018 / Estimation 2019	RON 3,246,230 / RON 3,850,000
Fleet of vehicles	+180 trucks (24 to) under exclusive contract with DGH Log & Sped clients; 55 lightweight semi-trailers Berger Ecotrail
Locations	Bucharest
Expansion plans 2019/2020	Team trainings; software investment



**Ahead Logistics** is the Romanian branch of the German Group **Ahead Logistics GmbH**. The company is investing continuously in modern technology in order to increase the level of transport and storage services offered to the customers from retail business, FMCG and industrial production.

The transport's share in last year's turnover was 60%, the expedition's share increased up to 38%, and there are also plans to increase it, because the profit is higher than in transport, and the logistics represents only 2%, but also with good developing chances.

## Logistics and storage

The company owns a logistics centre with the total surface of 103,000 sq.m, near Ploiești Industrial Park (about 9 km on DN 72) and connected with two railway lines to the national grid, where there is a 13,400 sq.m warehouse (including the 5,000 sq.m project for general cargo) and an extra 16,000 sq.m concrete platform for containers storage. The warehouse takes advantage of safety systems and LED lighting system, which is more economical and ecological. The company invested also in multifunctional equipment for pallets and in an ERP + WMS, which allows a better management of the activity.

**Ahead Logistics** offers unbeatable prices for storage, compared to its competitors, and an integrated solution with transport services.

## Domestic and international transport

**Ahead Logistics Group** has a total fleet of over 100 trucks and in Romania the fleet has been modernized with EURO 6 units, at the moment all the fleet being produced after 2013, (including 14 trucks production 2017). Now, in Romania the fleet has reached the level of 47 unit trucks + refrigerated semitrailers and also refrigerated autochassis of 18 tons. The

company offers several competitive advantages: rapidity in executing orders, modern vehicles, specialized staff in carrying out orders 24/24, continuous monitoring of the trucks via GPS and a complete insurance package (CASCO, CMR internal/external up to EUR 100,000, Green Card).

The Romanian company has restarted the international transport activity with its own fleet of modern trucks in order to be present on all markets. At the same time, on the domestic transport, **Ahead Logistics** wants to maintain a name, a portfolio, the connections. "We know the market very well, so we can easily find solutions to any problem", said Mircea Mănescu, General Manager of **Ahead Logistics**.

**Ahead** has also invested recently to expand the fleet with 12 and 18 tons refrigerated trucks, in order to be more flexible towards client needs.

## Freight forwarding

**Ahead** offers, with the support of its German shareholder, domestic and international transport services in the best condition and prices, from Germany, France, Benelux, Spain, Scandinavian countries etc.

The company wants to offer a mix between its 47 own trucks (for the biggest clients) and over 200 subcontracted trucks (for clients with small and variable volumes).

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Ap. 3-4, Second district, Bucharest  
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e-mail: [management@ahead-logistics.ro](mailto:management@ahead-logistics.ro)  
web: [www.ahead-logistics.ro](http://www.ahead-logistics.ro)



## DELAMODE ROMANIA

Delamode Romania, part of Xpediator Group (publicly listed at London Stock Exchange market), has 25 years of expertise in transportation and logistics field in Romania, through 9 hubs strategically located and more than 40,000 sq.m of warehouses

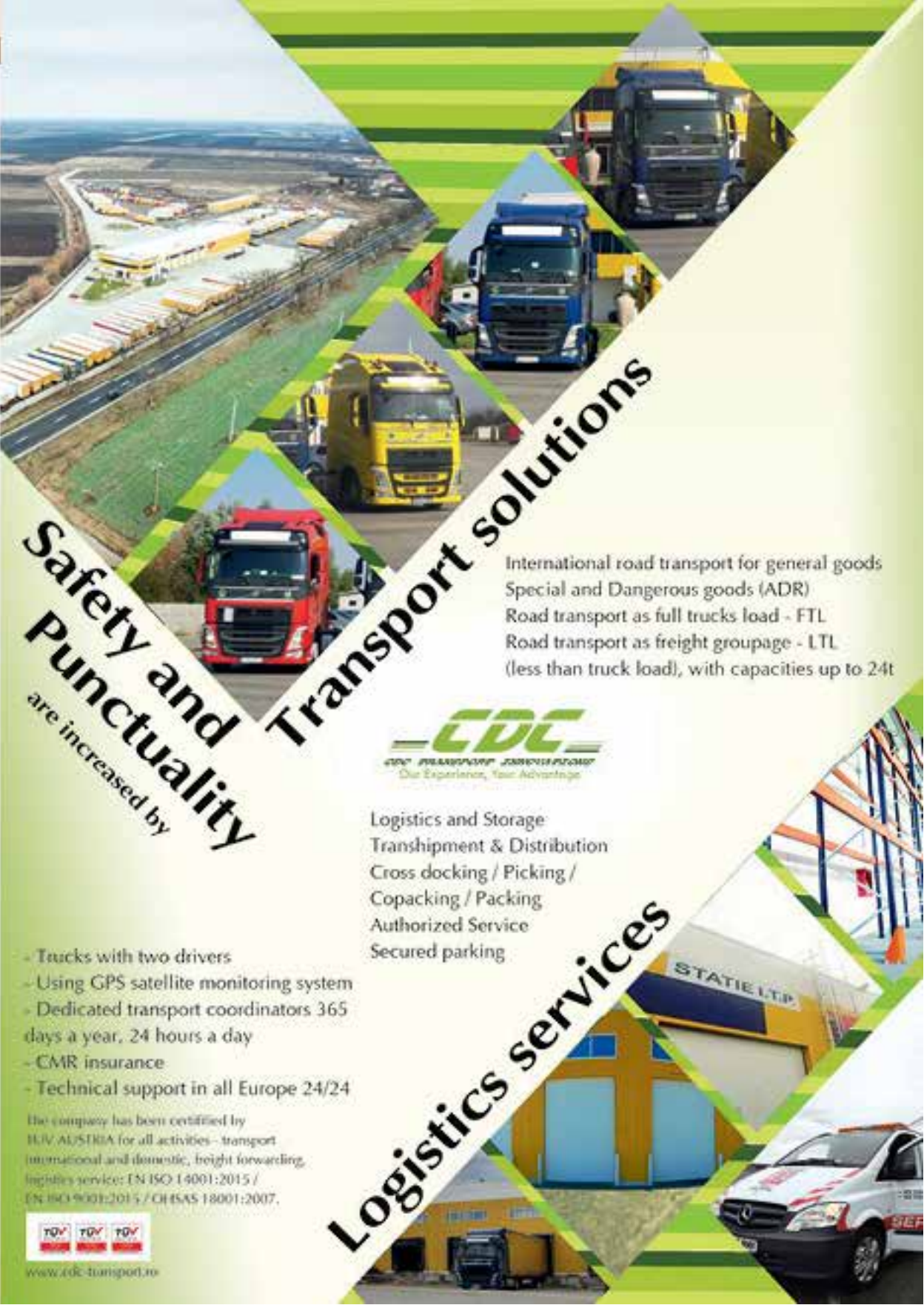
Turnover 2018	RON 124,992,238
Profitability rate 2018	2%
Number of employees	300
Total storage surface in Romania	+40,000 sq.m
Locations	Bucharest, Otopeni, Sibiu, Timisoara, Oradea, Bacău, Constanța (2), Urziceni, Ploiești

## QeOPS

With over 10 years experience in logistics and operations, recognized and awarded by the specialized organizations, both at national and European level, the QeOPS team meets the demands of the customers with customized logistic solutions, aiming at contributing to a correct and harmonious development of any type of business - online or offline, B2B or B2C - irrespective of the business sector. The company has been founded in 2015 with the main activity logistics for e-commerce.

Capital of the company	RON 145,000
Owners / Shares	Paul Copil 80%, Gabriel Copil 20%
Turnover 2018 / Estimation for 2019	RON 2.3 mln. / 4 mln.
Profitability rate in 2018 / Estimation for 2019	6% / 12%
Evolution of the profitability rate in the last 5 years	continuous growth
Number of employees	32
Fleet of vehicles	4
Total storage surface in Romania	7,000 sq.m
Locations	CTPark Bucharest West, Dragomirești-Deal
Types of products that can be stored	fashion, IT&C, electronics, sports wear, cosmetics
Expansion plans 2020/2019	opening new hubs up to 20,000 sq.m





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**Logistics services**

- Trucks with two drivers
- Using GPS satellite monitoring system
- Dedicated transport coordinators 365 days a year, 24 hours a day
- CMR insurance
- Technical support in all Europe 24/24

The company has been certified by  
BIV AUSTRIA for all activities - transport  
international and domestic, freight forwarding,  
lighting service: EN ISO 14001:2015 /  
EN ISO 9001:2015 / CHASAS 18001:2007.



[www.cdc-transport.it](http://www.cdc-transport.it)

## DACHSER ROMANIA

The company was founded in 2008.

Capital of the company	RON 1,470,200
Owners / Shares	DACHSER SE 50%, LIEGL ENGELBERT 50%
Turnover 2018 / Estimation 2019	RON 83,136,628 / RON 85,293,459
Profitability rate 2018 / Estimation 2019	6.1% / 6.3%
Evolution of the profitability rate in the last 5 years	5.79% (2014), 4.72% (2015), 6.70% (2016), 7% (2017), 6.1% (2018)
Number of employees	90
Total storage surface in Romania	10,800 sq.m
Locations	Bucharest, Brasov, Ploiesti, Arad
Specificity	SEVESO III warehouse in Ploiesti

## ENGLMAYER ROMANIA

Englmayer Romania was founded in 2003. The group was founded 161 years ago, in 1858.

Owners / Shares	G. Englmayer, Spedition GmbH 100%
Clients names or fields of activity	textiles, automotive, spare parts, paper, furniture, parquet, stationery, tyres
Turnover 2018 / Estimation 2019	EUR 14,500,000 / EUR 17,000,000
Profitability rate 2018 / Estimation 2019	2.9% / 3.2%
Evolution of the profitability rate in the last 5 years	7.8% (2014), 6.2% (2015), 6.3% (2016), 0.3% (2017), 2.9% (2018)
Number of employees	90
Fleet of vehicles	Over 150 subcontracted fixed trucks
Total storage surface in Romania	10,000 sq.m - only cross dock
Locations	Florești (Cluj), Arad, Dragomirești Deal (Bucharest), Sibiu, Bacău
Specificity	Height between 6 and 10 m, with doors and ramps. Video-surveilled and secured warehouse spaces. Warehouses used exclusively for cross-dock, equipped with scanners and access control.
Types of products that can be stored	general cargo
Expansion plans 2019/2020	Expansion of cross dock branch in Arad up to 5,000 sq.m New TMS software. Development of scan on delivery services. IT investments in securing the IT network and internal softwares. Vehicles and drivers branding



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[www.dachser.ro](http://www.dachser.ro)

## DSV SOLUTIONS

Based in Dragomirești Deal, it is part of a company founded in 1976 in Denmark. In 2019, DSV joined forces with Panalpina, another leading provider of transport and logistics services. Going forward, now 60,000 employees in more than 90 countries work passionately to deliver great customer experiences and high-quality services.

<b>Owners / Shares</b>	DSV Solutions Holding A/S, Denmark 100%
<b>Profitability rate 2018 / Estimation 2019</b>	3.06% / 4.5% -6 %
<b>Locations</b>	CTP Park km 13 and km 23
<b>Expansion plans</b>	Organic growth

## EU.TRA.LOG.REMI

EU.TRA.LOG.REMI started the activity in Reșița on the 17<sup>th</sup> of August 2004 with internal and international road transports and freight merchandise.

<b>Owners / Shares</b>	Mirela Ciobanu 100%
<b>Turnover 2018 / Estimation 2019</b>	RON 17,361,666 / RON 16,501, 679
<b>Profitability rate 2018 / Estimation 2019</b>	1.2% / 2.76%
<b>Evolution of the profitability rate in the last 5 years</b>	6% (2014), 6.3% (2015), 4.9% (2016), 2.5% (2017), 1.2% (2018)
<b>Number of employees</b>	16
<b>Total storage surface in Romania</b>	10,000 sq.m
<b>Locations</b>	Reșița, Timișoara
<b>Specificity</b>	3,000 sq.m indoor warehouse, 6 m height and 7,000 sq.m outdoor space in Reșița

## FAN COURIER EXPRESS

Based in Ștefănești de Jos, Ilfov county, the company started activity in 1998 as a courier operator

<b>Capital of the company</b>	RON 100,000
<b>Owners / Shares</b>	Felix Pătrășcanu, Neculai Mihai, Adrian Mihai
<b>Clients</b>	all industries
<b>Turnover 2018 / Estimation 2019</b>	EUR 145,000,000 / EUR 166,000,000
<b>Number of employees</b>	6,650
<b>Fleet of vehicles</b>	3,800
<b>Locations</b>	Ștefănești de Jos and 14 other locations in Bucharest and 118 in the country



### DSV GROUP

DSV is a global supplier of transport and logistics services.

With offices and facilities in more than 80 countries on six continents, we provide and run supply chain solutions for thousands of companies on a daily basis. Our reach is global yet our presence is local and close to our customers.

DSV was established in 1976, in Denmark. Since then, the Group carried out a number of acquisitions, the most important ones being Samson Transport (1997), DFDS Dan Transport (2000), Frans Maas (2006), ABX LOGISTICS (2008), UTi Worldwide (2016) and Panalpina (2019).

### DSV IN ROMANIA

In Romania, DSV operates 6 locations and manages 90,000 m2 Class A warehouses. We first appeared on the Romanian market in 1994 and, since then, we have been appreciated for professionalism, high quality services and a modern infrastructure.

Our services:

- Logistics - warehousing, distribution, value added services
- International transport by road, air & sea
- Domestic transport
- Projects, over - dimensioned transports
- Cargo insurance & customs clearance

### CONTACT DETAILS

DSV Solutions SRL

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Tel.: +40 21 528 62 00/ 431 31 00; e-mail: [marketing@ro.dsv.com](mailto:marketing@ro.dsv.com)

[www.ro.dsv.com](http://www.ro.dsv.com)

## DUMAGAS TRANSPORT

The company started in 1996 in Craiova and the main activity is road transport.

Type of organisation	joint stock company
Capital of the company	EUR 4,650,000
Owners / Shares	3B Romania Transport BV, Netherlands
Clients names or fields of activity	FMCG, automotive industry, consumer goods
Turnover 2018 / Estimation 2019	EUR 38,000,000 / EUR 43,000,000
Estimation of profitability rate for 2019	EUR 450,000
Number of employees	380
Fleet of vehicles	190 tractors, 350 semitrailers
Total storage surface in Romania	5,000 sq.m controlled temperature
Locations	Craiova, Cluj, Timișoara, Brașov, Cluj
Types of products that can be stored	food & controlled temperature goods
Expansion plans 2019/2020	fleet increase; TMS and control software, storage

## FM ROMANIA

Founded in 1967, FM Logistic is a major global player in supply chain with expertise spanning warehousing, transport and co-packing. In Romania, the company was founded in 2003.

Type of organisation	An independent, family-owned company, 100% privately
Capital of the company	RON 28,226,710
Owners	FM Logistic, France
Clients names or fields of activity	FMCG, retail, cosmetics and beauty, health, home and personal care
Turnover 2018 / Estimation	RON 134,138,587 / RON 145,912,864
Profitability rate in 2018	-5.92%
Evolution of the profitability rate in the last 5 years	0.36% (2014), 2.54% (2015), 1.55% (2016), -0.37 (2017)
Number of employees	670
Fleet of vehicles	70 trailers
Total storage surface in Romania	100,000 sq.m owned warehousing area
Locations	Dragomirești Deal (Ilfov) - 20,000 sq.m ambient & pharmaceutical warehouse, Petrești (Dâmbovița) - 30,000 sq.m general goods; Timișoara - 50,000 sq.m ambient & TC warehouse
Types of products that can be stored	food, pharmaceutical, general goods
Expansion plans 2019/2020	In 2019/2020 FM Logistic will place particular focus on the development of warehousing services, co-packing and transport - activity development with domestic LTL services, in city LTL distribution, through continuous improvements and innovations, automation and mechanization.



# DUMAGAS

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## EUROCCOPER

The company was founded in 1994 and the main activity was customs brokerage.

<b>Owners / Shares</b>	Aldo Roccon 75%, Maria Noje 25%
<b>Clients names or fields of activity</b>	electrical power industry, automotive, retail and FMCG
<b>Turnover 2018/ Estimation 2019</b>	RON 45,980, 000 / RON 49,000,000
<b>Profitability rate in 2018 / Estimation for 2019</b>	9% / 9.30%
<b>Evolution of the profitability rate in the last 5 years</b>	the profitability rate increased constantly
<b>Number of employees</b>	165
<b>Total storage surface in Romania</b>	Timisoara: 4,500 sq.m (ambiental / controlled temperature), 11 m height, 5,000 sq.m outdoor storage platform; Timisoara VGP: 4,000 sq.m indoor storage, 11 m height Arad: 500 sq.m, 8 m height, outdoor storage 2,000 sq.m Bucharest: 9,800 sq.m, 11 m height, 16,100 sq.m outside storage platform; Constanța Port: 4,000 sq.m covered storage surface, 6 m height and 10,000 sq.m external storage platform; Constanța Sud Agigea: 500 sq.m covered storage surface, 7.5 m height;
<b>Specificity</b>	Professional Warehouse Management System, last generation equipment used for handling the goods
<b>Types of products that can be stored</b>	General goods, controlled temperature (2° - 16°), food
<b>Expansion plans 2019/2020</b>	Expanding the storage, customs and forwarding activity. Developing new groupage route. Consolidation of forwarding and customs activity in Serbia. Investing in logistics platform in Constanța.

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## GEBRÜDER WEISS

Gebrüder Weiss entered the Romanian market in 1994 and its main activity consisted in transport of goods.

<b>Owners /Shares</b>	GW International Holding GmbH 99%, GW Beteiligungs GmbH 1%
<b>Clients names or fields of activity</b>	automotive, oil & gas, telecommunications, construction materials, FMCG, retail
<b>Turnover 2018 / Estimation 2019</b>	EUR 62,000,000 / +3%
<b>Number of employees</b>	650
<b>Total storage surface in Romania</b>	over 60,000 sq.m logistics and cross-docking area
<b>Locations</b>	Bucharest, Arad, Cluj, Sibiu, Craiova, Bacău, Constanța, Oradea, Brașov
<b>Types of products that can be stored</b>	general cargo, ADR
<b>Expansion plans 2019/2020</b>	expansion of Bolintin Deal terminal

## GOPET ROMANIA

GOPET Romania, founded in 2002, is part of GOPET Group, a regional player headquartered in Sofia, Bulgaria, with local presence and operations in Poland, Greece and Spain. It is a TOP10 Romanian T&L company providing its local and international clients with an extensive and performant range of services: efficient and reliable transport solutions (FTL, LTL, groupages) for all Europe and CIS countries; rail solutions from Romania and Hungary to UK, Benelux, Germany, France and Poland; warehousing (Pitești); sea and air shipping solutions available at Group Level.

<b>Capital of the company</b>	RON 200
<b>Owners / Shares</b>	Petrov Peter Lilkov, 100%.
<b>Clients and field of activity</b>	automotive, agriculture, chemical, construction, electronics, FMCG, heavy industries, retail and pharma
<b>Turnover 2018 / Estimation 2019</b>	RON 200,445,574 / +5%
<b>Profitability rate 2018</b>	1%
<b>Evolution of the profitability rate in the last 5 years</b>	1% (2018), 0.28% (2017), 1.82% (2016), -0.33% (2015), -2% (2014)
<b>Number of employees</b>	85
<b>Total storage surface in Romania</b>	8,000 sq.m
<b>Locations</b>	Pitești (Argoselu)
<b>Specificity</b>	racking system; clear internal height 8.5 m; floor capacity 5 to/ sq.m.; bridge crane up to 12.5 ton force; reach truck/forklift, warehouses for general cargo, WMS
<b>Expansion plans 2019/2020</b>	long term development towards becoming a Top3 player on the Romanian market. Key growth drivers will be: client focus via services diversification on all geographical destinations; extension of green transportation solutions, with consolidation of intermodal flows; further integration with services available at GROUP level, such as Sea and Air solutions; business agility improvement via continuous digitalisation.





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**Gebrüder Weiss**

Transport and Logistics



## Company profile: Gebrüder Weiss Romania

Being present in Romania since 1994 through the collaboration with Cargolog, a local transport company, **Gebrüder Weiss Romania** offers integrated logistics solutions, as well as a complete range of services including road, rail transport air and sea freight, and logistics solutions.

The expansion strategy implemented since the beginning had as a result some important investments in office buildings, warehouses, equipment and qualified staff.

In 2018 **Gebrüder Weiss Romania** inaugurated the extension of Sibiu branch, disposing of a surface of 4.500 sq.m of logistics and cross-docking area. The extension will enable us to meet increasing customer requirements and to handle the growing volume of orders even better.

In 2018, 690,000 consignments with a

total weight of 1.2 million tons were handled, corresponding to an increase of eleven percent as compared to the previous year.

Today, **Gebrüder Weiss Romania** relies on a national infrastructure through its own logistics platform with 9 logistics hubs strategically placed in Bucharest, Arad, Sibiu, Braşov, Cluj, Bacău, Oradea, Constanţa and Craiova.

With more than 600 employees, 60,000 sq.m storage and cross-docking capacity, 62 millions euros and an impressive references portfolio as a result of an efficient implementation of intelligent logistics solutions for its customers, **Gebrüder Weiss Romania** represents with success **Gebrüder Weiss GmbH**, its parent company, the biggest logistics services and transport provider from Austria.

## GEFCO ROMANIA

Capital of the company	RON 3,478,000
Clients names or fields of activity	Market leaders from various branches of industry: Car manufacturers, Automotive suppliers, Industrial manufacturers, Agriculture and agricultural equipment, Life Sciences, Health and Bodycare, High-tech and home equipment, Energy, FMCG
Number of employees	120
Total storage surface in Romania	5,500 sq.m
Locations	Bucharest - HQ, Iojita, Arad - cross-dock and warehouse, Mioveni - automotive compound, Craiova
Specificity	A+ facility of 10 m height with metallic racks of 9 m height, bulk zone and customs bounded area, full HD CCTV surveillance system covering full warehouse, IGSU (fire prevention) certified with automated fire prevention systems. Activities run in GEFCO facilities: cross-docking, customs services, warehousing and other added value services in logistics process
Types of products that can be stored	general cargo, high value cargo area, standardized shape of goods or oversized with different type of packaging
Expansion plans 2018 / 2019	upon customer's requests

## H.ESSERS ROMANIA

H.Essers was founded in 1928 by Henry Essers and at that time its main activity was transport. H.Essers Romania, part of H.Essers Group, is a Belgian company. In Romania the headquarter is in Oradea, Bihor.

Owners / Shares	Noel Essers - son of Henry Essers, founder of the company
Clients names or fields of activity	chemicals, pharma, high security and general goods
Turnover 2018	EUR 732,000,000
Number of employees	6,340
Fleet of vehicles	1,320 trucks and 3,120 trailers
Total storage surface in Romania	95,000 sq.m of warehouse in Romania. On global level 1,060,000 sq.m of warehouse
Locations	Bucharest, Oradea, Timisoara, Roman
Specificity	H.Essers is an asset-based company focusing on complex logistics and value added services using own assets and complex IT in-house developed systems. H.Essers is focusing on the following 3 main strategic market segments: pharma, chemicals and high value. H.Essers is one of the top players in the market when it comes to smart solutions and efficient operations in a high secured environment. Its security concept is unique in the market by combining best-in-class security solutions in transports and warehousing.
Types of products that can be stored	chemicals, pharma, high security and general goods
Expansion plans 2019/2020	The future growth plans include an expansion by 10 000 sq.m of chemical warehouse - SEVESO High Level in Bucharest, while continuing the development of the services in the strategic niches: pharma, chemicals and high value.



**GEFCO România** este unul dintre principalii actori de pe piața de logistică și numărul 1 în sectorul pentru vehicule finite, grație expertizei sale 360° pe tot parcursul lanțului de aprovizionare.

La nivel de Grup, **GEFCO** este expert în soluții de distribuție și oferă servicii globale, integrate într-o rețea multimodală, mereu pregătiți să aducă inovarea în lanțul de distribuție al partenerilor.



**GEFCO**

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Partners, unlimited

## IB CARGO

Founded in 2008, the first main activity was freight forwarding.

Capital of the company	RON 184,850 lei (EUR 38,916)
Name of the owners and shares of each of them	Cătălin-Bogdan Putineanu 56.24%, Interfracht Spedition 43.76%
Clients names or fields of activity	Freight Forwarding
Turnover 2018	RON 145,495,414; EUR 31,196,084
Estimation 2019	RON 158,317,471/EUR 33,329,994
Profitability rate 2018 / Estimation 2019	6.8% / 7%
Evolution of the profitability rate in the last 5 years	from 5.5% in 2014 to 6.8% in 2018
Number of employees	92
Locations	Bucharest (headquarter), Constanța and Cluj (branches)
Types of products that can be stored	All types of products, because we can subcontract storage space according to the clients needs.
Expansion plans 2019/2020	Airfreight and maritime consoles from new destinations

## INTERNATIONAL ALEXANDER

Independent integrator of transport, warehousing, integrated logistics services and real estate founded in 2003

Capital of the company	RON 1,001,000
Owners / Shares	Apreutese Simion Ioan 100%
Clients names or fields of activity	automotive, FMCG, electronics
Turnover 2018 / Estimation 2019	EUR 68,000,000 / EUR 86,000,000
Profitability rate 2018 / Estimation 2019	5% / 6%
Number of employees	1,200
Fleet of vehicles	550
Total storage surface in Romania	500,000 sq.m land and 30,000 sq.m available for storage, 70,000 sq.m cars compound
Locations	Arad, Timișoara, Bucharest, Sibiu, Sebeș
Types of products that can be stored	general cargo, tyres, cars compound etc.
Expansion plans 2019 / 2020	increase of fleet / warehouses. Additional services provided in Serbia, Hungary and Germany



International Alexander story started in 2003, when the company was founded by Simion Ioan Apreutese - founder & CEO. Part of the Holding are presently 10 companies and more than 1,000 employees, working together to achieve the common goals. With a clearly outlined strategy, coherent system of values and continuous investment, International Alexander celebrates 15 years of business activities.

In few words, International Alexander Holding is an independent transportation, integrated logistics and real estate provider.

The headquarter of the company is located in Arad, in a strategic position, close to the border with Hungary. In Romania, we are also present in Timișoara, Bucharest, Oradea, Slatina, Sebeș and as next step in Sibiu.

Outside Romania, we extended our transportation and logistics activities in Hungary, Germany and Serbia.

The first and main activity, also the current core business is consisting of transportation, with own fleet of about 400 Mercedes tractors, 7.5 to trucks, vans (FTL, LTL, groupages, distribution express transports) and almost 500 Krone mega trailers (110 trailers are Hucpeack trailers because we are considering the development of intermodal transport), harmony sector complemented by warehousing & logistics (our strategy is to continue the development of own A class warehouses, the land being already purchased in Timișoara, Sibiu and Bucharest), professional machine

for washing crates, real estate and not lately integrated logistics straight into customer's factories (in 2018-2019, over 380 skilled International Alexander employees will manage logistics operations in client's factories and this way we are able to streamline operations and ensure the necessary flexibility in a sector in need of continuous motion and acceleration).

Last year, the company achieved 55 million euro turnover and for this year, turnover is estimated to 68 million euro, maintaining the dynamic growth of 20-25% rate of recent years and a profitability of about 5%.

In a highly competitive market, flexibility and quality of services must be perfectly matched to remain a supplier chosen by customers. International Alexander is ISO Certificated (ISO 9001, 14001 AND 18001), AEO certificated and also TSR certificated by Tapa, security being probably the most important feature in client's requirements. Additional, all our logistic sites will be FSR certificated.

As perspective, International Alexander operates more than 700 clients and already has under discussion future collaboration opportunities, for new projects with the existing clients and with potential new clients, related to transportation, logistics and intermodal.

The work of the entire team is reflected in the financial results, annually increased, and in the award of this year, "International Alexander - the best performing operator in transportation and logistics", in the previous year, 2017, "The most efficient Romanian transport operator", "Prize for Financial Stability", "Transport Company of the Year", "Popularity Award".

Focus is to maintain the values, so that through provided services, we remain a reliable partner of our clients!



## MA.RA. LOGISTICS QUALITY

The company started in 2009 and the first main activity was goods transport and logistics.

<b>Capital of the company</b>	RON 125,000
<b>Owners / Shares</b>	Radita Maria 40%, Zipoli Paola 10%, Albini&Pitigliani 50%
<b>Clients fields or activity</b>	fashion industry, High Tech industry, household and electronic industry, personal care products, furniture and decoration industry, mechanical products and spare parts
<b>Turnover 2018 / Estimation 2019</b>	EUR 3,125,892 / EUR 3,438,481
<b>Profitability rate 2018 / Estimation 2019</b>	0.0609% / 0.0555%
<b>Evolution of the profitability rate in the last 5 years</b>	0.060% (2018), 0.064% (2017), 0.079% (2016), 0.079% (2015), 0.069% (2014)
<b>Number of employees</b>	14
<b>Total storage surface in Romania</b>	860 sq.m
<b>Locations</b>	Bucharest
<b>Specificity</b>	9 m clear-height at the eaves; Loading and unloading services; Weighing of goods; Pick & Pack standard operations for pallets, boxes, single piece, RTW -Ready to Wear, GOH -Garments on Hanger; Palletizing services; Packaging and labeling services; Preparing orders for delivery; Outsourcing; Warehousing Operations; Customer Service; Track and Trace; Centralized stock goods
<b>Types of products that can be stored</b>	general goods
<b>Expansion plans 2020/2019</b>	The company started an expansion project by constructing a building consisting of a warehouse with an area of about 3,000 sq.m, but also spaces for operating offices with an estimated area of 450 sq.m. As the company has been in continuous development for several years, it wants to expand its activity so that it can develop in the future, and this requires a major change in the infrastructure to avoid possible blockages caused by insufficient space.





More than transport

With an experience over 20 years in the field, **MaRa Logistics Quality** provides road transport, sea and air freight services, for import and export. Since 2000 we are the correspondents of the **Albini & Pitigliani Group** in Romania, thus, we benefit from all the advantages of a network with global coverage, with know how and experience in expeditions over 70 years.

#### 5 factors for success

##### 1. Global Coverage

Trough our partners we benefit from the support and collaboration of over 200 correspondents from the whole world.

##### 2. Flexibility

We can easily adjust the freight transport requirements of our customers.

##### 3. Relevant Experience

Our team has an experience of over 20 years and permanently develops its resources.

##### 4. Specialised Services

We are recognised today by a large part of manufacturers and customers from Romania as reliable partners.

##### 5. Cost Advantage

With solid partnerships with vendors, carriers and other providers of services, we can assist and offer competitive prices to our customers.

The most frequently required service is the transport of general goods (textiles and garment on coat hangers, commodities, electronics, High-Tech, personal care products, household appliances, furniture, ceramics/tiles, mechanical products and spare parts for automotive industry, etc.)

#### Our services are:

- Road lines daily departures from and to multiple destinations from Europe and Romania.
- Road transport for goods in less than truckload LTL and FTL
- Air&Sea freight (FCL, LCL).
- Customs clearance service and export control.
- Warehousing services

**MaRa Logistics Quality SRL**  
3<sup>th</sup> District, Street Drumul între Tarlale  
160-174, Bucharest  
**Phone:** 021/255.55.02  
**E-mail:** office@maralogistics.ro  
**Web:** www.maralogistics.eu

## M&M MILITZER & MUNCH ROMANIA

M&M Militzer & Munch Romania is the local branch of the M&M Militzer & Munch Group - a middle size multinational company, with a tradition over 100 years in freight forwarding and logistics, with over 100 branches in over 30 countries.

Capital of the company	RON 100,000
Owners / Shares	85% M&M Militzer & Munch International Holding AG, 10% Mihai Valentin Dragu, 5% others
Turnover 2018 / Estimation 2019	EUR 14,253,918 / 15,000,000
Profitability rate 2017 / Estimation 2018	1.2% / 1.7%
Number of employees	30
Total storage surface in Romania	1,144 sq.m
Locations	CTPark Bucharest-Pitești Highway (warehouse & sea & road); Airport GATT Building Otopeni (air & customs broker)
Specificity	general cargo, ADR
Types of products that can be stored	general cargo

## MARVI LOGISTIC

Marvi Logistic was established in 2009, as a limited liability company with Romanian private capital, offering a range of services in international transport of goods, acting both as transport company and freight forwarding agency. As a novelty, it is acting nowadays also in behalf of Pallex on the internal market. The company extended its activity, acting also in e-commerce and commerce, selling Italian imported products. The 2 activities (transport and commerce) are connected, as it uses the trucks in order to bring the goods from Italy to Romania for its own stores.

Capital of the company	RON 500,000
Turnover 2018 / Estimation 2019	EUR 8,992,333 / EUR 11,702,127
Profitability rate 2018 / Estimation 2019	2.68% / 2.04%
Number of employees	217
Total storage surface in Romania	370 sq.m
Locations	Bujoreni (Vâlcea)
Types of products that can be stored	general goods





### **MARVI LOGISTIC SRL**

was established in 2009 activating in international transport of goods and forwarding. A project with a lot of courage, starting with two trucks and three employees. At present the company owns 11 new generation trucks and it works with more than 50 subcontractors, managing altogether over 100 trucks.

The expertise in the industry and the quality of the services had as a result a long partnership with well known companies in the country and outside, our slogan being „In time... at any time!“. The recognition of the quality came shortly afterwards: The first place in the ranking of the companies in Vâlcea

county in 2010, 2012, 2014 and 2017, awarded by The Chamber of Commerce and Industries Vâlcea. Also Excellence Awards in 2016 and 2017 and, at the same time, the second place in Top Afaceri Romania 2011 and 2012.

Due to the vision of the management, the activity of the company expanded step by step. One of the important steps was the opening in Rm. Vâlcea of the first two markets that sell genuine Italian products. We complement the trading activities with the transport of the imported products in Italy with our own trucks.

At the moment we have a chain of 31 shops all over the country and

one online. Completing the initial activities we started to carry goods also under PallEx franchise with dedicated trucks, being the PallEx representative for Vâlcea and Gorj counties. In 2016, due to the highly professional approach and the involvement of the personnel, the company has been recognized as „The most proactive member of the PallEx network“. And in 2017, Marvi Logistic became „The Best PallEx member“, who had „The Most Dynamic Evolution“.

All the recognitions motivate us to go on with the same enthusiasm and the same confidence that we can succeed if this is what we want!

## MARVICON

The company was founded in 2015 with the main activity domestic and international transport of general goods

Capital of the company	RON 1,020
Owners / Shares	Multiple shareholders
Clients names or fields of activity	general goods and sea container transport
Turnover 2018	RON 56,361,083 / RON 94,000,000
Profitability rate in 2018 / Estimation for 2019	1.73% / 1.5-2%
Number of employees	260
Fleet of vehicles	145
Locations	Oradea (Bihor)
Expansion plans 2019/2020:	5-10% increase of the fleet

## ORIENT

The company was founded in 1991 with the main activity transport.

Capital of the company	RON 26,000,000
Owners / Shares	100% Radu Nicoară
Clients names or fields of activity	wood, steel, food, textile, electronics
Turnover 2018 / Estimation 2019	EUR 22,220,000 / EUR 23,200,000
Profitability rate 2018	2.97%
Evolution of the profitability rate in the last 5 years	3.02% (2018), 2.86% (2017), 2.74% (2016), 3.25% (2015), 2.19% (2014)
Number of employees	72
Fleet of vehicles	6 plus subcontractors
Locations	Rădăuți, Arad, Bucharest
Expansion plans 2019/2020	new office in Cluj in 2020





CONTAINER  
TRANSPORT

# MARVICON

NATIONAL & INTERNATIONAL TRANSPORT



TAUTLINER  
TRANSPORT



GROUPAGE  
LCL TRANSPORT



EUROPEAN  
LOGISTICS



WAREHOUSING



*With us on the right track  
Cu noi pe drumul cel bun*

**www.marvicon.ro**

**Marvicon** is a relatively new company on the Romanian market. Established in 2015, **Marvicon** reached in 2018 a turnover of over 12 million euros, which brought it in the top 100 transport companies in Romania. And the estimate for 2019 is 20 million euros. The company carries out domestic and international transport, being specialized in shipping of maritime containers. It currently has 143 trucks, most for container transport, but also collaborates with subcontractors.

As container transport is in development in our country, the company's plans include fleet growth, both on the domestic route and for roundtrips. For the internal transport **Marvicon** currently uses trucks with tarpaulin or tipper trucks that transport animal feeds from Constanța throughout the country. **Marvicon** also uses subcontractors to serve its customers. The company is also in negotiations with other potential customers for transport to Romania, but also to Western Europe. **Marvicon** transports to all EU states, but mainly Benelux, Germany, France, Austria, Hungary and Romania. For 2020 **Marvicon** plans to build a warehouse that will eventually have 10,000 m<sup>2</sup> on the 31,000 m<sup>2</sup> land held in Oradea. The space will also include an office, a service hall and a truck laundry.



## MAINFREIGHT

Clients names or fields of activity	FMCG, retail, automotive, consumer electronics, oil&gas
Capital of the company	EUR 2.62 bln. group operating revenue
Turnover 2018	RON 107,172,792
Number of employees	266
Fleet of vehicles	60 units all ADF
Total storage surface in Romania	24,000 sq.m
Locations	Ploiesti, Cluj-Napoca, Bacău
Specificity	20,000 sq.m A class warehouse in Ploiesti with 80 loading docks; 3,000 sq.m warehouse in Cluj and 3 loading docks. The hub in Bacău is used mainly for crossdock activities. The buildings have a storage height of 10.5 m and are fitted with modern racking equipment and are also equipped with fire protection sprinklers and 24/7 security and surveillance.
Types of products that can be stored	general goods, alimentary and non alimentary goods, electronics and also dangerous goods (ADF)
Expansion plans 2019	open a new branch in Timisoara

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# Mainfreight - Special People, Special Company

Mainfreight is in the business of global supply chain logistics. Put simply, we partner with our customers to provide the full spectrum of warehousing, value added services, domestic transport and international air and ocean freight operations.

Whether you are sending one pallet down the road, a full truck load to the other side of the country or a full container across the globe; our operations are powered by a global team of passionate people operating worldwide.

As a team we are focused on setting the bar high with new service initiatives, new branches worldwide and continuous improvement in every area of our supply chain capabilities.

Backed by world class technologies, our global business is built on two unshakable beliefs that we live by on any given day:

- The only way to keep ahead of our competitors is by the superior performance of our people
- The only measure of superior performance is how the customer perceives it

Currently the organization has 247 branches in 22 countries with more than 7,500 team members worldwide.

**Mainfreight Group** is present in Romania since 1992, operating now from Ploiești, Cluj, Bacău and in the future from Timișoara. Romanian branches strengthen the role as one of the most reliable and trustworthy logistics services providers in the region. The total capacity of the warehouses in Romania is 24,000 sq.m. Our A class warehouse facilities comply with the latest standards and are fitted with modern racking equipment. The warehouse in Ploiești is located on a plot of ground of 85,000 sq.m in the Industrial Park Ploiești. This location has a capacity of 20,000 sq.m and offers the possibility of another 40,000 sq.m. extension. The building has a storage height of 12 m, 80 loading docks and is equipped with fire protection sprinklers and 24/7 security and surveillance. The warehouse can store general goods, alimentary and non alimentary goods, electronics, but also dangerous goods (ADR).

Starting with September '18 we inaugurated a new warehouse in Cluj with a capacity of 3,000 sq.m. We're specialized also in Value Added Services (stock management, labelling, packaging and repackaging, assembling, adding documentation), as well as Transport, International groupages, European forwarding, domestic distribution and customs brokerage. The European line hauls from Italy, Netherlands, Poland, Germany and France are connecting Romania several times/week.

**Mainfreight** Romania has a complex domestic distribution network with more than 50,000 shipments / year, the goods being distributed from our hubs located in Ploiești, Cluj and Băcau. From a single pallet till part loads, we take care of our customers' goods. We own a fleet of 60 transport units (all carrying ADR-package) and we have long term collaborations with high quality and trusted dedicated subcontractors. In Ploiești we're operating the distribution and inspection centre of the Chep business in Romania, managing the collection / distribution, handling, storage and inspection of the pallets.

Since 2005, **Mainfreight** has its own customs office located in the neighbourhood of the customs head office of the Prahova region in Romania at its premises in Ploiești. Customs services are performed for various customers from many different business sectors. **Mainfreight** manages the transport and customs clearance of 1,000 containers annually from the port of Constanta to its premises in Ploiești. We're proud to collaborate in Romania with customers that are global leaders or top companies in their market for activities of FMCG, Retail, Automotive, Consumer electronics and Oil & Gas. The **Mainfreight** difference is in our people, our culture and you can measure the difference in our performance and in your results.

**Targoviste 72 Road, Cratgul lui Bot, 8 Km  
Industrial Park Ploiesti**

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**Mobile: +40 731 033 942**

**E-mail: [sales@mainfreight.ro](mailto:sales@mainfreight.ro),**

**[www.mainfreight.ro](http://www.mainfreight.ro)**



## QUEHENBERGER LOGISTICS ROU

The company has been founded in May 1999 and the main activity was transport.

Capital of the company	RON 14,600,000
Owners / Shares	Quehenberger Eastern Europe 99%, Quehenberger Logistics GMBH 1%
Turnover 2018	EUR 54,000,000
Services	contract logistics, domestic distribution, international road, air & sea transportation
Number of employees	700
Fleet of vehicles	40
Total storage surface in Romania	170,000 sq.m
Locations	Bucharest, Timișoara, Cluj, Constanța, Oradea, Arad
Specificity	class A warehouses, fashion, general goods, dry food and dangerous goods
Types of products that can be stored	automotives, fashion, FMCG, white goods & high tech
Expansion plans 2019/2020	Moldova region

## OVT LOGISTICZENTRUM

OVT Logisticzentrum was founded in 2002. It is based in Timișoara, Sibiu and Oradea and the main activity is logistic services (forwarding, warehousing).

Capital of the company	RON 700,000
Clients names or fields of activity	automotive, paper industry, beverage & food, industrial
Turnover 2018 / Estimation 2019	EUR 13,500,000 / 15,000,000
Profitability rate 2018 / Estimation 2019	7% / 8%
Evolution of the profitability rate in the last 5 years	7.4% (2015), 10.5% (2016), 10% (2017), 7% (2018)
Number of employees	180
Fleet of vehicles	40
Total storage surface in Romania	17,000 sq.m
Locations	Timișoara, Sibiu
Specificity	automotive class A warehouse
Types of products that can be stored	general goods





## SCHENKER LOGISTICS ROMANIA

DB Schenker stands for the transportation and logistics activities of Deutsche Bahn and was founded in 1872, in Vienna. With four branches, more than sixty offices in the country and 1,066 employees, DB Schenker is a Top logistics provider that covers widely the national market. The company offers the complete range of transport and logistics services (Road groupage-full loads, Air, Ocean, Rail, Contract Logistics - Supply Chain Management, Fairs and Exhibitions, Removals, Project Cargo, Customs brokerage and Port Operation), all of them in a tailored integration to meet the customer's demands and deliver solutions.

Capital of the company	RON 2,439,800
Clients names or fields of activity	automotive, electronics, healthcare / pharma, industrial goods, consumer goods, retail, perishables.
Turnover 2018	EUR 130,000,000
Evolution of the profitability rate in the last 5 years	4.29% (2012), 3.61% (2013), 3.78% (2014), 3.41% (2015), 2.34% (2016), 4.20% (2017)
Number of employees	1,066
Total storage surface in Romania	51,000 sq.m
Locations	Arad, Bucharest, Cluj-Napoca, Constanta MolIS branches. Covered Warehouse platforms, various across the country: Bucharest, Arad, Craiova, Timisoara, Curtici, Cluj-Napoca, Constanta.
Specificity	A class warehouse, equipped for controlled temperature +16 /+18 (Bucharest). ADR warehouse (Bucharest) suitable for classes 2, 3, 8 and 9.
Types of products that can be stored	palletized goods and also bulk storage
Expansion plans 2019	10,000 sq.m

## VOS LOGISTICS BULK

Capital of the company	RON 90,000
Owners / Shares	Vos Logistics Romania SRL 99%, Vos Logistics International BV 1%
Turnover 2018	RON 199,514,788
Estimation 2019	RON 170,000,000
Profitability rate (Profit/turnover) in 2018	0.07%
Estimation for 2019	0.02%
Evolution of the profitability rate in the last 5 years	135%
Number of employees	12



**Cifră de afaceri**

130 milioane €

**1,066 angajați**

**60 puncte de lucru**

**4 sucursale**

Arad

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\*Date statistice 2018

**25** de ani  
de activitate  
în România



## SKIPTRANS

The company has been founded in 2007 and the main activity was road transport of goods - internal and international.

Capital of the company	RON 20,000
Owners / Shares	JOST GROUP SA (99.95% shares) and Jost Roland Ernst Kurt Rolf (0.05% shares)
Clients names or fields of activity	Yamaha, Nike, Coca-Cola, DHL, Carrefour, Bosch, Fedex, Delhaize etc.
Turnover 2018 / Estimation for 2019	RON 285,664,074 / 330,000,000
Profitability rate 2018 / Estimation 2019	4.77 % / 5%
Evolution of the profitability rate in the last 5 years	4.77% (2018), 5.93% (2017), 9.58% (2016), 10.96% (2015), 13.07% (2014)
Number of employees	81 TESA employees and 917 drivers
Fleet of vehicles	660
Total storage surface in Romania	6 ha of land
Locations: Dezmir, Cluj Napoca	Dezmir (Cluj)
Expansion plans 2020/2021	In the next two years, the company intends to build a logistic warehouse and office buildings near the International Airport Cluj

## VOS LOGISTICS CARGO

Capital of the company	RON 90,000
Owners / Shares	Vos Logistics Romania SRL 99%, Vos Logistics International BV 1%
Clients names or fields of activity	
Turnover 2018	RON 514,658,693
Estimation 2019	RON 490,000,000
Profitability rate (Profit/turnover) in 2018	0.6%
Estimation for 2019	0.02%
Evolution of the profitability rate in the last 5 years	160%
Number of employees	13





When **Skiptrans** connects **Romania** with the Rest of Europe



## KLK EUROPE LOGISTICS (SINOTRANS)

The company was founded in 1918 with the main activity logistics and transport.

Capital of the company	EUR 783,264
Owners / Shares	100 % KLG Europe Rom Imobiliare SRL
Clients names or fields of activity	FMCG, Cosmetics, Home Appliances, IT & Communication, Manufacturing
Turnover 2018 / Estimation 2019	EUR 41,000,000 / EUR 44,000,000
Profitability rate 2018 / Estimation 2019	4.7% / 5%
Number of employees	420
Total storage surface in Romania	66,000 sq.m
Locations	Bucharest, Cluj-Napoca, Timișoara, Sibiu, Brașov, Bacău, Craiova, Constanța, Brăila
Types of products that can be stored	Ambiental goods, bulk or in racks stored goods
Expansion plans 2018/2019	50,000 sq.m for 2019-2022

## VOS LOGISTICS ROMANIA

Capital of the company	RON 9,295,724
Owners / Shares	Vos Logistics International BV 99%, Vos Logistics Solutions BV 1%
Turnover 2018	RON 171,434,056
Estimation 2019	RON 9,247,661
Profitability rate (Profit/turnover) in 2018	0.55%
Estimation for 2019	1%
Evolution of the profitability rate in the last 5 years	189%
Number of employees	358
Locations	Cluj

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The deadline is 30.04.2020. The Jury is based on professionals from retail, production, logistics and transport professionals and Tranzit magazine



## European presence

Cluj-Napoca (RO) | Bucharest (RO) |  
Oradea (RO) | Rubiera (IT) | Köln (DE)

## Fleet

300 units

## Services

- intermodal transport
- road freight  
(own fleet and forwarding)
- warehousing

## Turnover

26 mil. Eur (2018)

## Contact

+40 264 411 993  
sales@routiertransport.ro  
www.routiertransport.ro



## ROUTIER EUROPEAN TRANSPORT

The company is present on the road transport and logistics market in Romania and Europe since 2002. It started as a general freight carrier with complete trucks and developed in time a series of logistics services and solutions, as a response to customer requests and regional market demands.

Capital of the company	RON 2,665,000
Owners / shares	25% Alexandra Petegan, 25% Gheorghe Petegan, 25% Paras Petegan, 25% Bogdan Petegan
Clients names or fields of activity	industrial, furniture production, electronics, home appliances, FMCG, building materials, ceramics tiles, automotive
Turnover 2018 / Estimation 2019	EUR 26,000,000 / 30,000,000
Estimation of the profitability rate for 2019	1%
Evolution of the profitability rate in the last 5 years:	0.2% (2018 major investments in intermodal equipment and in IT system), 3.38% (2017), 1.31% (2016), 4.14% (2015), 0.62% (2014)
Number of employees	160
Fleet of vehicles	300 (own) units/trailers
Total storage surface in Romania	5,000 sq.m
Locations	Gilău/Cluj-Napoca, Bucharest, Oradea (România), Rubiera (Italy), Köln (Germany)
Types of products that can be stored	general/palletized good
Expansion plans 2019/2020	intermodal transport development, forwarding department/business, increase the presence on the German market

# TOP TURNOVER

No.	Company	County
1	SCHENKER LOGISTICS ROMANIA	BUCHAREST
2	HAVI LOGISTICS	BUCHAREST
3	TRANSMEC RO	BIHOR
4	GEFCO ROMANIA	BUCHAREST
5	GEBRUDER WEISS	GIURGIU
6	DSV SOLUTIONS	ILFOV
7	QUEHENBERGER LOGISTICS ROU	ARGES
8	KUEHNE + NAGEL	GIURGIU
9	YUSEN LOGISTICS	ILFOV
10	GOPET ROMANIA	BUCHAREST
11	HARTL CONNECT TRANSPORT GMBH	TIMIS
12	KLG EUROPE LOGISTICS	GIURGIU
13	LAGERMAX AUTOTRANSPORT	ARAD
14	I.B. CARGO	ILFOV
15	CARGO-PARTNER EXPEDITII	BUCHAREST
16	FM ROMANIA	TIMIS
17	DELAMODE ROMANIA	BUCHAREST
18	POMFRACHT	ILFOV
19	ATLAS IMOBILIARE	ALBA
20	KARL HEINZ DIETRICH INTERNATIONAL EXPED	ILFOV
21	DHL LOGISTICS	ILFOV
22	ORIENT	SUCEAVA
23	ERKANN LOGISTICS	BUCHAREST
24	DACHSER ROMANIA	BUCHAREST
25	ALL CARGO EXPRES	TIMIS
26	PHENUS LOGISTICS	ARGES
27	CEVA LOGISTICS	ILFOV
28	DGH LOG & SPED	BUCHAREST
29	TRANSFER INTERNATIONAL SPEDITION	BUCHAREST
30	M&M Militzer & Munch ROMANIA	BUCHAREST
31	ENGLMAYER ROMANIA	CLUJ
32	INTERNATIONAL BUSINESS TRANSPORT	BUCHAREST
33	ARIES LOGISTICS	CONSTANTA
34	OVT LOGISTICZENTRUM	TIMIS
35	SLS CARGO	ILFOV



# LOGISTICS COMPANIES

Turnover (netto) (EUR)	Profit (netto) (EUR)	Loss (netto) (EUR)	Total Assets (EUR)	Claims-debts (EUR)	Average number of employees
129,426,026	3,023,267	0	66,756,636	15,059,876	1,066
127,029,178	237,468	0	20,490,450	-10,014,894	404
85,117,082	2,340,818	0	32,450,493	-5,477,928	453
83,659,786	2,152,640	0	24,606,593	3,998,709	119
62,411,049	1,043,361	0	29,397,997	271,476	586
60,419,975	1,566,114	0	18,119,503	1,133,625	442
54,432,739	0	1,546,311	12,255,972	-1,912,524	865
52,002,971	1,658,443	0	9,632,314	89,209	550
48,784,785	1,951,869	0	14,790,990	2,512,718	1,228
43,106,575	234,998	0	4,837,454	-285,085	90
41,587,081	166,872	0	5,694,637	5,525,757	68
40,197,528	1,622,165	0	12,662,547	2,254,790	413
38,657,404	1,135,058	0	24,104,125	-5,447,401	261
31,289,336	2,140,277	0	7,362,554	1,234,632	80
31,267,996	598,588	0	7,497,932	870,185	212
28,828,143	0	1,707,522	18,196,817	-10,615,998	740
26,880,051	410,426	0	10,513,453	408,793	225
26,166,198	596,557	0	12,207,214	-856,128	112
24,745,662	1,494,259	0	14,554,771	-316,545	303
23,414,691	1,407,102	0	102,058,513	-18,057,618	720
22,619,621	2,087,130	0	7,000,067	6,815	73
21,975,867	542,610	0	10,467,852	1,193,231	67
19,869,223	141,057	0	13,202,743	-8,113,145	344
17,878,845	1,091,854	0	4,822,599	675,713	83
17,713,301	703,008	0	8,144,454	1,501,495	29
17,411,237	208,539	0	4,949,764	1,062,516	39
16,789,417	1,720,330	0	5,433,439	1,703,395	172
16,096,145	698,114	0	4,623,210	988,840	40
14,305,565	65,936	0	5,863,099	376,701	40
14,253,918	174,833	0	2,447,063	372,278	32
14,240,194	343,065	0	3,047,014	379,982	82
14,022,776	0	323,579	5,955,563	-715,854	128
13,863,247	668,231	0	5,473,652	-34,380	16
13,791,629	848,957	0	8,759,580	-2,327,063	130
12,018,646	221,924	0	4,048,393	-147,516	86

# TOP TURNOVER

No.	Company	County
36	PAIL CARGO LOGISTICS - ROMANIA SOLUTIONS	ILFOV
37	EKOL INTERNATIONAL LOGISTICS	BUCHAREST
38	HERMES FORWARDS	BUCHAREST
39	POMEXPED GROUP	BUCHAREST
40	WHITELAND LOGISTICS	BUCHAREST
41	ROHEL TRANS INTERNATIONAL	ILFOV
42	EUROCCOPER	TIMIS
43	2B OPEN LOGISTICS	BUCHAREST
44	HELLMANN WORLDWIDE LOGISTICS	ILFOV
45	MARVI LOGISTIC	VALCEA
46	FEROSA SPED	ILFOV
47	EXPEDITORS INTERNATIONAL ROMANIA	ILFOV
48	PANKARPATHIA LOGISTICS	BIHOR
49	ITC LOGISTIC ROMANIA	BRASOV
50	CARSPEED	DOLJ
51	MAURICE WARD & CO	TIMIS
52	KBS SPED	HARGHITA
53	ELVADA COMPANY	CONSTANTA
54	HOPI RO LOGISTICS	TIMIS
55	NORD VEST CAMIOANE	BIHOR
56	WABERER'S ROMANIA	HARGHITA
57	FAST FREIGHT	CONSTANTA
58	CARTRANS SPEDITION	PRAHOVA
59	KLAUSS & WAGNER LOGISTICS	BUCHAREST
60	A&C TRANS COMPANY INTERNATIONAL	ILFOV
61	DECOMAR LOGISTIC	BUCHAREST
62	DTS LOGISTIC SERVICES	BUCHAREST
63	IDL BUCHAREST	ILFOV
64	XPO SUPPLY CHAIN BEVERAGE ROMANIA	BUCHAREST
65	H.ESSERS LOGISTICS	BIHOR
66	AIGLE CONSULT	CLUJ
67	HAEMMERLING GROUP LOGISTIC	HARGHITA
68	SEAL EXPRESS LOGISTICS	CONSTANTA
69	DIETRICH-HONOLD LOGISTICS	ILFOV
70	ATLAS TRANSLOGISTICS	CONSTANTA

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# LOGISTICS COMPANIES

Turnover (netto) (EUR)	Profit (netto) (EUR)	Loss (netto) (EUR)	Total Assets (EUR)	Claims-debts (EUR)	Average number of employees
11,870,875	292,939	0	3,673,792	1,150,764	0
11,614,961	0	689,642	9,306,920	408,512	101
11,512,267	424,598	0	3,904,118	256,992	31
11,386,881	814,037	0	7,499,073	-1,792,798	22
10,387,378	0	717,044	2,085,144	-2,276,131	258
10,225,369	204,194	0	3,015,794	595,805	24
9,888,346	890,821	0	4,960,691	-599,298	128
9,752,643	188,941	0	1,549,901	118,811	0
9,330,158	493,724	0	2,354,804	262,563	12
9,089,025	243,502	0	4,795,683	-2,197,592	105
8,987,386	296,257	0	1,294,128	157,126	6
8,743,628	618,512	0	2,467,552	-198,016	58
8,696,227	252,247	0	6,572,477	-2,617,890	104
8,527,938	6,653	0	3,409,906	-210,132	53
8,474,564	32,580	0	4,623,640	-2,500,339	80
8,297,451	218,046	0	2,513,277	-123,992	18
8,191,809	466,849	0	4,140,731	1,442,223	15
7,785,146	231,634	0	2,805,634	-1,307,333	51
7,632,985	237,857	0	3,038,333	-213,545	133
7,554,105	149,908	0	3,588,580	-1,675,235	52
7,507,358	258,696	0	4,886,042	403,346	0
7,408,704	38,657	0	4,155,295	-2,431,884	26
7,345,631	2,795	0	1,239,571	-100,929	12
7,286,373	130,851	0	1,368,471	263,992	8
7,260,273	185,563	0	2,389,282	-222,735	16
7,186,844	783,585	0	1,982,000	582,676	474
7,084,054	431,612	0	1,864,134	-519,009	21
6,889,628	61,993	0	3,631,336	-1,851,720	269
6,887,542	107,554	0	1,975,257	833,582	337
6,827,207	268,636	0	2,154,021	1,265,942	152
6,821,282	182,517	0	2,668,622	-578,026	12
6,816,412	200,208	0	2,148,350	408,564	38
6,511,682	223,369	0	1,801,220	-9,041	17
6,410,235	957,065	0	15,046,300	564,160	169
6,376,517	516,914	0	3,740,641	-1,492,761	32

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Contract Logistics - Domestic Distribution - Road Freight - Air & Sea Freight Forwarding

## TOP TURNOVER

No.	Company	County
71	SMART SPEDITION	BUCHAREST
72	INTERNATIONAL LINES TRANSPORT	SIBIU
73	PALLET EXPRESS	SIBIU
74	ELKA INTERNATIONAL	HARGHITA
75	BAPEXIM	BUCHAREST
76	COTECNA ROMANIA	CONSTANTA
77	SPEDCOM	GIURGIU
78	UPS SCS ROMANIA	ILFOV
79	RABEN LOGISTICS ROMANIA	ILFOV
80	NDB LOGISTICA ROMANIA	ARAD
81	A.S.G. WIND TRANSPORT	ILFOV
82	INNIGHT ROMANIA EXPRESS	BIHOR
83	ELTRA LOGIS	ARGES
84	BENETON SERV	DAMBOVITA
85	NORDIC LOGISTIC	ILFOV
86	HARBORSZ LOGISTIC	BIHOR
87	UNIMASTERS LOGISTICS	ILFOV
88	ASTORIA	BUCHAREST
89	CRICTRANS	BIHOR
90	EUROPRIM INTERMED	BUCHAREST
91	FEREST LOGISTICS	BUCHAREST
92	PAL CARGO	BIHOR
93	COMPAGNIE D'AFFRETEMENT ET DE TRANSPORT ROMANIA	GIURGIU
94	FEROTRANS BANAT	TIMIS
95	SERIM PRESTARI SERVICII	ILFOV
96	BOLLORE LOGISTICS ROMANIA	BUCHAREST
97	GIRELLI LOGISTICS ROMANIA	BIHOR
98	EAST CARGOLOG	CLUJ
99	VIVPE LOGISTICS	BUCHAREST
100	NCA S P E D NCA	ARAD

Values expressed in euro from their countervalues in national currency at a rate of 1 EUR=4.65 lei



Turnover (netto) (EUR)	Profit (netto) (EUR)	Loss (netto) (EUR)	Total Assets (EUR)	Claims-debts (EUR)	Average number of employees
6,212,783	757,196	0	3,532,880	307,446	12
6,147,535	0	13,358	1,492,860	-693,282	25
6,129,801	876,425	0	2,134,137	620,524	60
5,904,439	25,829	0	3,065,403	-848,650	104
5,789,996	278,481	0	6,246,789	-24,075	16
5,739,051	1,271,939	0	3,785,989	48,515	133
5,630,131	93,248	0	1,604,515	559,863	12
5,630,131	93,248	0	1,604,515	559,863	12
5,627,769	0	1,394,348	1,694,367	-2,816,252	61
5,569,393	0	99,734	4,913,210	-77,682	67
5,334,942	302,687	0	2,309,813	-673,788	36
5,165,085	0	223,758	749,589	-675,660	29
5,003,723	293,899	0	4,174,242	-1,272,729	0
4,978,546	299,473	0	3,304,309	-1,685,174	74
4,873,457	0	625,116	3,146,701	-1,446,977	195
4,800,657	217,267	0	1,590,407	786,626	4
4,730,251	0	76,303	1,397,418	-114,566	20
4,687,596	260,858	0	3,275,193	-99,759	148
4,483,984	61,158	0	3,333,337	-1,917,062	49
4,418,378	120,562	0	1,283,852	-97,584	20
4,360,955	1,160,474	0	4,315,535	420,874	6
4,305,845	71,684	0	1,127,478	-226,008	39
4,235,345	0	443,602	1,477,565	-1,160,162	37
4,164,407	352,322	0	1,456,740	371,842	4
4,027,950	71,103	0	1,355,141	102,112	9
3,990,200	197,919	0	1,395,761	-11,502	18
3,902,167	211,969	0	2,717,712	-430,241	26
3,877,418	70,753	0	877,177	-9,401	2
3,859,044	129,223	0	800,235	-199,637	189
3,857,415	135,913	0	1,270,785	-128,772	2

## TOP TURNOVER

No.	Company	County
1	AQUILA PART PROD COM	PRAHOVA
2	VOS LOGISTICS CARGO	CLUJ
3	DUVENBECK LOGISTIK	BRASOV
4	INTERNATIONAL ALEXANDER	ARAD
5	SKIPTRANS	CLUJ
6	PANEURO INTERNATIONAL	MURES
7	XPO TRANSPORT SOLUTIONS ROMANIA	ARAD
8	DOLO TRANS OLIMPIC	ARGES
9	GARTNER EUROTRANS ROMANIA	TIMIS
10	ARCESE TRANSPORT	CLUJ
11	VOS LOGISTICS BULK	CLUJ
12	DIANTHUS COMPANY	ARGES
13	RAVITEX	BIHOR
14	MICROFRUITS SRL	BUCHAREST
15	INTERNATIONAL LAZAR COMPANY	ARGES
16	H ESSERS	BIHOR
17	DUNCA EXPEDITII	TIMIS
18	VOS LOGISTICS ROMANIA	CLUJ
19	TOTAL N S A	SIBIU
20	DUMAGAS TRANSPORT	DOLJ
21	PRACTICOM	BUCHAREST
22	J.T. GRUP OIL	CONSTANTA
23	MEGA TRUCKING TIMISOARA	TIMIS
24	BALADEI THIRDWAY TRANSPORT	CLUJ
25	LOGISTIC E VAN WIJK	CLUJ
26	FILIP	ARAD
27	EURO FLEET TRANSPORTS	CLUJ
28	FARTUD	TIMIS
29	ELITON TRANS	ARGES
30	COM DIVERS AUTO RO	ARGES
31	POMSTYL IMPEX	DAMBOVITA
32	VIO TRANSGRUP	DAMBOVITA
33	POMFRACHT	ILFOV
34	TRANSPECO LOGISTICS & DISTRIBUTION	BUCHAREST
35	ROUTIER EUROPEAN TRANSPORT	CLUJ



# TRANSPORT COMPANIES

Turnover (netto) (EUR)	Profit (netto) (EUR)	Loss (netto) (EUR)	Total Assets (EUR)	Claims-debts (EUR)	Average number of employees
209,402,406	960,147	0	92,998,398	-30,678,909	2,249
110,677,160	625,750	0	20,124,496	-3,526,418	13
82,680,353	2,419,427	0	24,877,112	8,767,794	834
69,591,739	3,506,251	0	49,947,030	-19,956,695	867
61,433,134	2,932,221	0	21,880,083	4,498,328	751
58,599,174	0	2,616,012	13,717,555	-7,266,873	123
55,353,217	0	550,562	41,892,549	-20,346,965	591
52,161,984	1,349,271	0	57,171,056	-39,386,749	429
49,927,725	0	612,587	6,276,446	-3,169,069	783
48,632,881	282,534	0	24,688,271	-5,949,306	466
42,906,419	31,203	0	7,100,463	-2,839,172	12
40,942,437	3,509,463	0	20,611,925	-1,878,198	368
39,899,187	1,147,009	0	17,593,808	-5,661,993	450
38,903,727	1,989,922	0	8,631,074	1,753,612	80
38,543,283	414,246	0	59,718,958	-30,552,408	463
38,181,838	633,748	0	5,132,856	1,235,515	611
37,905,759	23,412	0	18,813,238	-9,379,093	565
36,796,235	160,651	0	14,622,502	1,191,719	358
36,341,212	159,920	0	30,219,195	-13,503,452	424
35,773,584	236,646	0	17,078,711	-8,075,564	365
35,223,142	33,995	0	6,971,847	-5,311,511	731
34,021,309	1,060,398	0	14,647,682	643,489	30
33,770,869	14,090	0	11,162,598	-1,314,572	700
32,320,805	0	131,100	2,879,384	-113,598	390
32,210,680	1,844,013	0	13,724,184	24,789	378
31,419,708	719,308	0	12,064,155	-1,591,421	379
30,681,321	5,278,143	0	20,442,241	552,612	207
30,305,691	2,980,443	0	14,405,582	-2,973,760	293
29,040,590	1,057,609	0	6,908,972	1,230,441	300
28,326,593	488,871	0	12,547,899	-2,429,730	280
26,831,309	1,071,604	0	20,786,755	-5,185,311	439
26,759,758	1,944,081	0	13,525,178	1,721,251	139
26,166,198	596,557	0	12,207,214	-856,128	112
25,079,651	6,760,778	0	23,978,611	-7,628,192	303
25,038,758	61,564	0	16,004,863	-7,429,226	187

## TOP TURNOVER

No.	Company	County
36	HTR SPEDITION	IASI
37	POZOTI PRODCOM	BIHOR
38	AGEXIM SPEDITION	ARGES
39	TRUCK ROM INTERNATIONAL	BUCHAREST
40	STALKER MEDIA	DAMBOVITA
41	HOEDLMAYR-LAZAR ROMANIA	ARGES
42	MAINFREIGHT	PRAHOVA
43	HARTL CARRIER	TIMIS
44	COM DIVERS LOGISTIC	ARGES
45	TRANS EURO EXPRESS 94	BUCHAREST
46	VECTRA INTERNATIONAL	BRASOV
47	STEP ONE SPEDITION	CALARASI
48	TRANS SESE	CLUJ
49	INT. TRANSPORTE POPOVICI	COVASNA
50	TERRAVIA	TIMIS
51	GALEX SRL	SIBIU
52	BCVO LOGISTICS	BISTRITA-NASAUD
53	CDC TRANSPORT INNOVATIONS fosta NISTOR TRANS COMPANY	ARAD
54	CARBON LOGISTIC	TIMIS
55	HENRIK HANSEN	SATU MARE
56	EUROPEAN LOGISTICS	ARGES
57	GBT LOGISTIC	CLUJ
58	SPEED LINE IMPEX	ARAD
59	AVIS TRANS	IASI
60	"HOPE SPED"	COVASNA
61	TIR EXPRESS	TIMIS
62	HOLLEMAN SPECIAL TRANSPORT & PROJECT CARGO	BUCHAREST
63	PRESTAGRO COMIMPEX	ARAD
64	PHENUS LOGISTICS	ARGES
65	LUAR	ARAD
66	LANCETTI TRANSPORT	BIHOR
67	H.Z. LOGISTICS RO	SIBIU
68	CARPAT CEMTRANS	BUCHAREST
69	FELBERMAYR ROMANIA	ILFOV
70	PORT TRANS SRL	DAMBOVITA



# TRANSPORT COMPANIES

Turnover (netto) (EUR)	Profit (netto) (EUR)	Loss (netto) (EUR)	Total Assets (EUR)	Claims-debts (EUR)	Average number of employees
24,891,766	368,730	0	9,392,328	-4,274,540	173
24,171,368	1,412,523	0	5,992,063	217,295	84
23,876,849	1,891,216	0	14,075,732	-8,123,104	360
23,868,110	15,007	0	9,092,404	-2,175,700	208
23,598,575	214,114	0	6,052,422	-2,890,985	60
23,163,389	957,218	0	14,701,247	-512,738	184
23,047,912	868,956	0	15,703,020	-5,197,291	232
22,589,382	23,823	0	13,783,332	2,562,894	42
22,451,662	825,255	0	11,804,363	-4,896,575	88
22,433,737	1,512,630	0	17,795,903	-2,136,254	312
22,054,195	275,603	0	12,762,358	-277,513	333
22,023,328	767,154	0	10,247,123	250,931	283
21,943,671	0	560,599	15,483,383	-6,198,811	286
21,804,563	192,647	0	7,858,966	-4,382,593	235
21,257,566	388,092	0	9,726,551	-578,359	253
20,552,701	197,973	0	3,858,298	656,532	285
20,352,424	244,086	0	5,660,118	84,822	250
20,254,869	80,010	0	7,179,403	-2,947,915	232
20,076,026	613,153	0	17,158,221	-12,602,220	197
19,630,507	0	748,590	15,415,734	-1,852,404	268
19,491,708	48,534	0	15,830,837	-5,389,397	233
19,317,223	148,365	0	3,192,254	-98,709	284
19,081,305	378,984	0	10,754,073	-6,871,805	228
18,841,268	137,569	0	14,271,977	-5,000,863	224
18,339,450	495,516	0	6,096,937	-850,086	61
18,291,163	18,499	0	28,963,295	-3,901,749	127
18,066,686	696,890	0	19,139,040	-7,877,562	108
17,557,808	578,791	0	5,470,866	-977,157	29
17,411,237	208,539	0	4,949,764	1,062,516	39
17,275,734	135,259	0	6,642,699	-1,012,884	223
17,102,280	1,187,783	0	11,760,107	-5,823,262	170
16,163,962	0	346,470	5,525,887	-2,269,271	213
15,976,185	184,923	0	7,620,198	3,368,315	72
15,915,196	726,760	0	6,182,103	2,492,252	127
15,902,461	1,434,580	0	16,056,103	-7,654,354	66

## TOP TURNOVER

No.	Company	County
71	FILADELFIA	BISTRITA-NASAUD
72	KRAFT LOGISTIC	MURES
73	CHEVROLET C.C.	ARGES
74	POLACH LOGISTICS & TRANSPORT	ARAD
75	TRANSCOM	PRAHOVA
76	OPREAN	ALBA
77	BINAR SPEED EXCLUSIVE	PRAHOVA
78	ARAISSA GROUP	SUCEAVA
79	ICIRJAL 2003	ARAD
80	BIPMOBILE	TIMIS
81	DORU SI FLORIN	BIHOR
82	KLACSKA ROMANIA	BUCHAREST
83	TREIRO	ILFOV
84	LUSCAN COM	BUZAU
85	EW LOGISTICS EXPRESS	GALATI
86	KSC TRANSPORT	BIHOR
87	MARACANA SFL	TIMIS
88	LOGISTICS RO TIR	SIBIU
89	CARTRANS PREDI	PRAHOVA
90	ANASPED	SUCEAVA
91	GV & OPREAN LOGISTICS	ALBA
92	LAGERMAX AED ROMANIA	ARAD
93	MARVICON	BIHOR
94	IMPERIAL WET	HARGHITA
95	VECTRA LOGISTIC	BRASOV
96	BUPLACU TRANS COM	DAMBOVITA
97	QUATTRO INTERSPED	ARGES
98	EXPRESS EUROSCAN	SUCEAVA
99	GRUBER LOGISTICS	BIHOR
100	CAT-ION	BACAU

Values expressed in euro from their countervalues in national currency at a rate of 1 EUR=4.65 lei



Turnover (netto) (EUR)	Profit (netto) (EUR)	Loss (netto) (EUR)	Total Assets (EUR)	Claims-debts (EUR)	Average number of employees
15,849,963	43,666	0	5,070,380	-912,631	180
15,564,925	0	1,266,934	5,977,986	-6,867,178	252
15,267,233	291,940	0	6,380,156	1,151,693	53
15,207,018	493,148	0	4,711,253	-718,476	167
14,990,695	231,274	0	6,140,906	-3,607,648	186
14,831,207	161,696	0	7,055,938	-2,684,699	185
14,278,372	1,519,483	0	6,974,966	-15,060	171
14,130,867	92,130	0	6,817,397	-3,876,702	185
14,056,206	37,249	0	12,176,724	-10,736,182	143
13,827,556	85,467	0	8,848,809	-2,752,046	198
13,759,744	827,989	0	4,355,473	-2,969	111
13,739,922	0	2,862,418	13,567,834	-4,821,384	205
13,405,125	444,876	0	7,794,649	-235,428	202
13,391,240	145,065	0	11,605,672	-2,211,925	194
13,244,789	60,964	0	2,712,765	284,102	124
13,190,359	92,103	0	4,964,036	-2,294,149	74
13,083,740	1,432,678	0	11,708,743	-3,205,505	183
12,753,972	243,735	0	5,221,635	-989,841	175
12,636,188	415,419	0	5,893,389	-1,566,024	208
12,595,997	876,817	0	6,140,313	154,105	64
12,510,090	51,586	0	2,822,674	-1,280,935	114
12,171,627	0	371,440	2,721,665	-2,737,993	85
12,120,663	659,076	0	2,386,349	305,814	170
11,820,737	0	56,741	744,131	-865,126	373
11,804,800	947,243	0	9,631,486	2,573,800	152
11,664,541	241,735	0	3,468,372	-185,065	46
11,630,784	970,108	0	4,145,274	714,090	20
11,478,499	1,417,821	0	5,287,333	1,248,556	145
11,403,049	0	194,778	4,106,994	-2,735,183	151
11,402,513	570,102	0	3,842,059	2,115,845	10

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Denumire firmă .....  
 Obiect de activitate .....  
 Cod fiscal / nr. înregistrare RC\* .....  
 Director general .....  
 Persoană de contact .....  
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