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Logistics Indicator in Q4 2013

Logistics upturn

Positive stimuli for the economy in 2014

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The findings of the BVL Logistics Indicator in the month of December confirm the expectations of the major conferences held during the autumn of 2013: the logistics sector will finish the year with a good performance and begin 2014 with significant momentum. Around 95 percent of logistics service providers and 85 percent of supply chain managers in industry and trade expect to see an unchanged or even improved business trend in the first quarter of 2014. The turnover of the German logistics sector in 2013 will probably be in the region of 230 billion euros. Around 2.85 million people are currently employed in logistics, equally divided between logistics service providers and the logistics departments of companies in industry and trade. These figures show that the performance of the German logistics industry in 2013 has been on a par with that of the record year that preceded it. It is fair to assume that we will see further growth of turnover of between one and three percent in 2014.

Across the board, the Indicator scores are up to levels that were last reached two years ago. In their one-year outlook, the service providers predict excellent capacity utilisation levels and significant growth of incoming orders, and they also forecast capacity expansion and growth in recruitment. Logistics managers in industry and trade are slightly more reserved in their assessment of the current situation and their expectations for the future, and although they expect major growth of domestic demand they also see indications of slower cross-border business.

Foreign business stimuli are expected to come more from the USA or China than from the Eurozone countries closer to the German borders. Based on the Purchasing Managers' Index, the mood of the US economy is considerably brighter, and the Chinese economy is maintaining its momentum through to the end of the year - against all expectations. The logistics experts polled for the Indicator see little hope of a dynamic trend in Europe, and above all the key markets of France and Spain are seen as problem cases. As the global economic situation remains a "mixed bag", companies are faced with complex macroeconomic and microeconomic scenarios. Complexity and cost pressure will continue to play a central role in the coming year, and logistics experts in industry, trade, the services and academia intend to meet these challenges by stepping up their cooperation - and this is also an excellent signal for 2014.