



maltacourtTM
Global Logistics

We take it personally.
We deliver it professionally.



Maltacourt Global Logistics



- More than 30 years experience In Global Logistics
- Maltacourt offices
 - UK : HQ
 - Hungary
 - Canada
 - USA
 - Australia



Logistically Logical



- Central location in Europe: market reach of 500 million customers of the European Union
- Hungary is the natural center of distribution for the CEE and SEE region, as well as CIS countries
- Extensive transport infrastructure, intermodal solutions
- Innovative, qualified logistics professionals, cost-effective labour pool
- Cost-cutting through competitive supply chain costs
- Modern warehousing and industrial facilities

Expanding motorway network



Existing
Future development

Vienna, 1 hr
Rotterdam, 12 hrs

Prague, 5 hrs
Munich, 6 hrs
Hamburg, 8 hrs

Warsaw, 10 hrs

Kyiv 12 hrs



Zagreb, 1 hr
Trieste, 6 hrs
Koper, 6 hrs

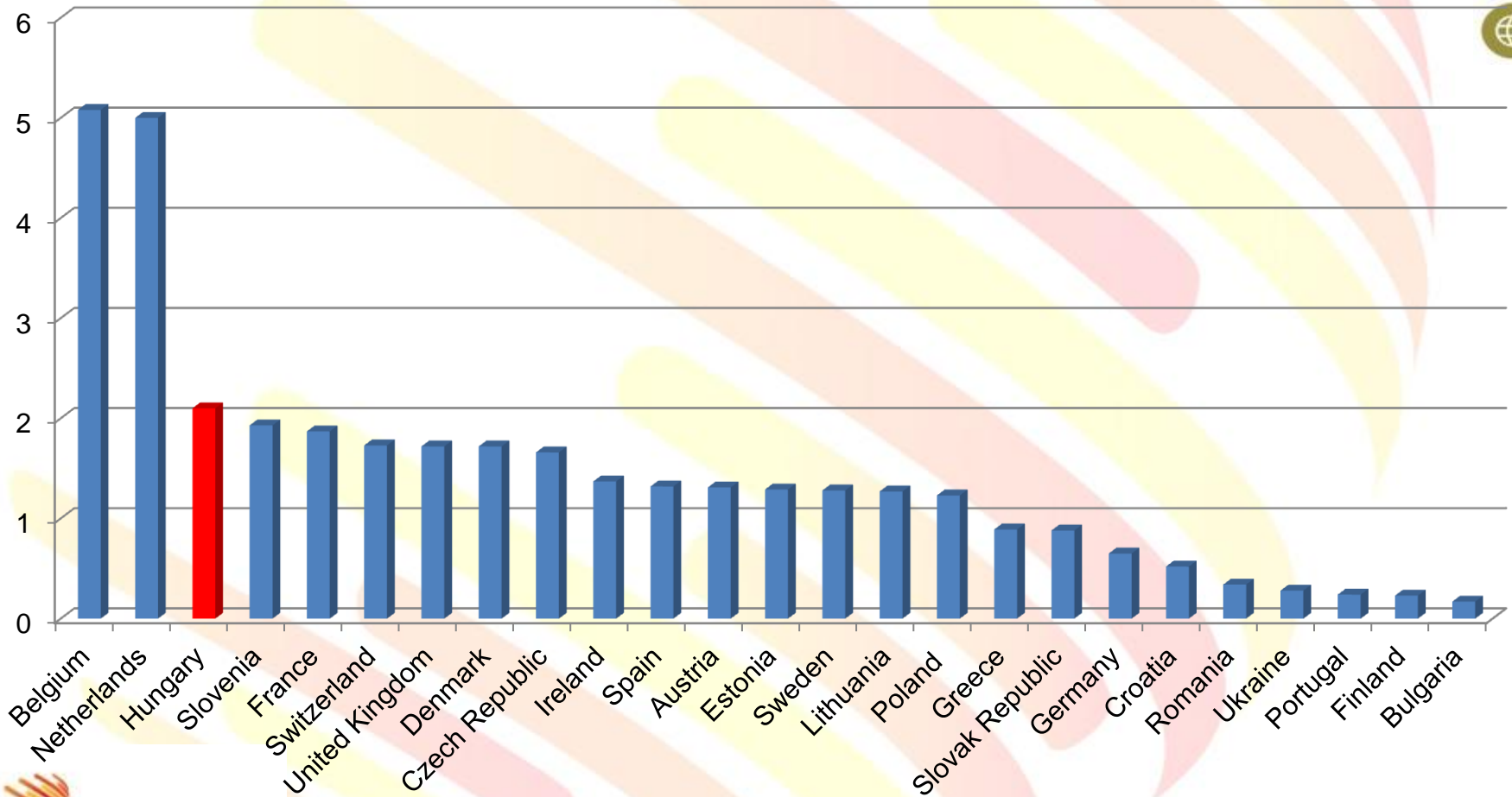
Bucharest, 10 hrs
Constanza, 12 hrs

- Only country which is at the cross roads of 4 PanEuropean transportation corridors

Road Density

km/km²

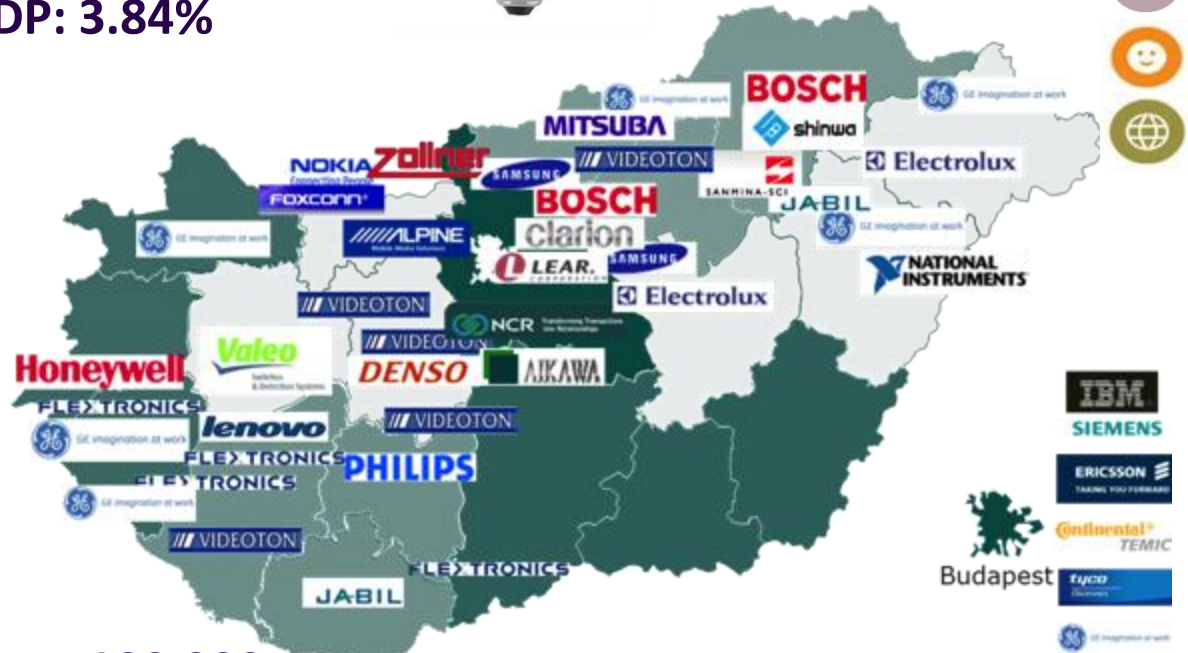
Source: IMD, World Competitiveness Yearbook, 2013



Electronics Sector



- Share of electronics in GDP: 3.84%
- Dominant subsectors:
 - Consumer Electronics
 - Computing
 - Communications
 - Components
 - Automotive electronics
- Total number of employees: 100,000
- Major multinationals: **Mitsuba, Lenovo, Continental, Honeywell, Electrolux, Visteon, Thyssen Krupp, Jabil, Lear, Alpine, Samsung, Nokia, GE, National Instruments, Bosch, Foxconn, Electrolux, Flextronics, Ericsson, IBM, Siemens, Videoton, Zollner**



Chemical Industry

- Over 220 chemical producers in Hungary
- Hungary-based BorsodChem (BC, acquired by Wanhua) and Tiszai Vegyi Kombinat (TVK) are the major players in the industry.
- Major foreign investors: **Wanhua, TEVA, Sanofi Aventis, Richter Gedeon, Henkel, P&G, Dow Chemical, BASF, ENI, Unilever, Zoltek, DSM**
- Major sub-sectors: fine chemicals, plastics, rubbers, oil processing



Medical Technology

- One of Hungary's most traditional economic sectors
- Employing approximately 10,000 people
- Today around 150 companies are engaged in medical device manufacturing
- Significant presence of large companies: **Philips, Cellitron, Coloplast, BD, Innomed, GE Healthcare, B.Braun, Hoya, Sauflon, Specsavers**
- Significant Hungarian companies : **Dispomedicor , 77 Elektronik, Medicores**
- Significant exports to : Argentina, Australia, Brazil, Canada, China, Colombia, Costa Rica, Egypt, Europe, Hong Kong, India, Israel, Japan, Malaysia, Mexico, New Zealand, Peru, Russia, Saudi Arabia, Singapore, South Africa, South Korea, Taiwan, United States



Food Industry

- Abundant raw material supply from high quality agricultural products
- 125,000 people are employed in the Hungarian food sector
- Food industry machinery production has presence of major global players, **John Deer, Linamar, Claas**
- Major foreign investors in Food Industry: **Givaudan, Bonduelle, Nestlé, Unilever, Kraft Foods, Coca Cola, Mars, Heineken, Bunge, Chio, Pepsico, Sara Lee, Kerry ingredients, Haribo, Nissin Foods, Danone**



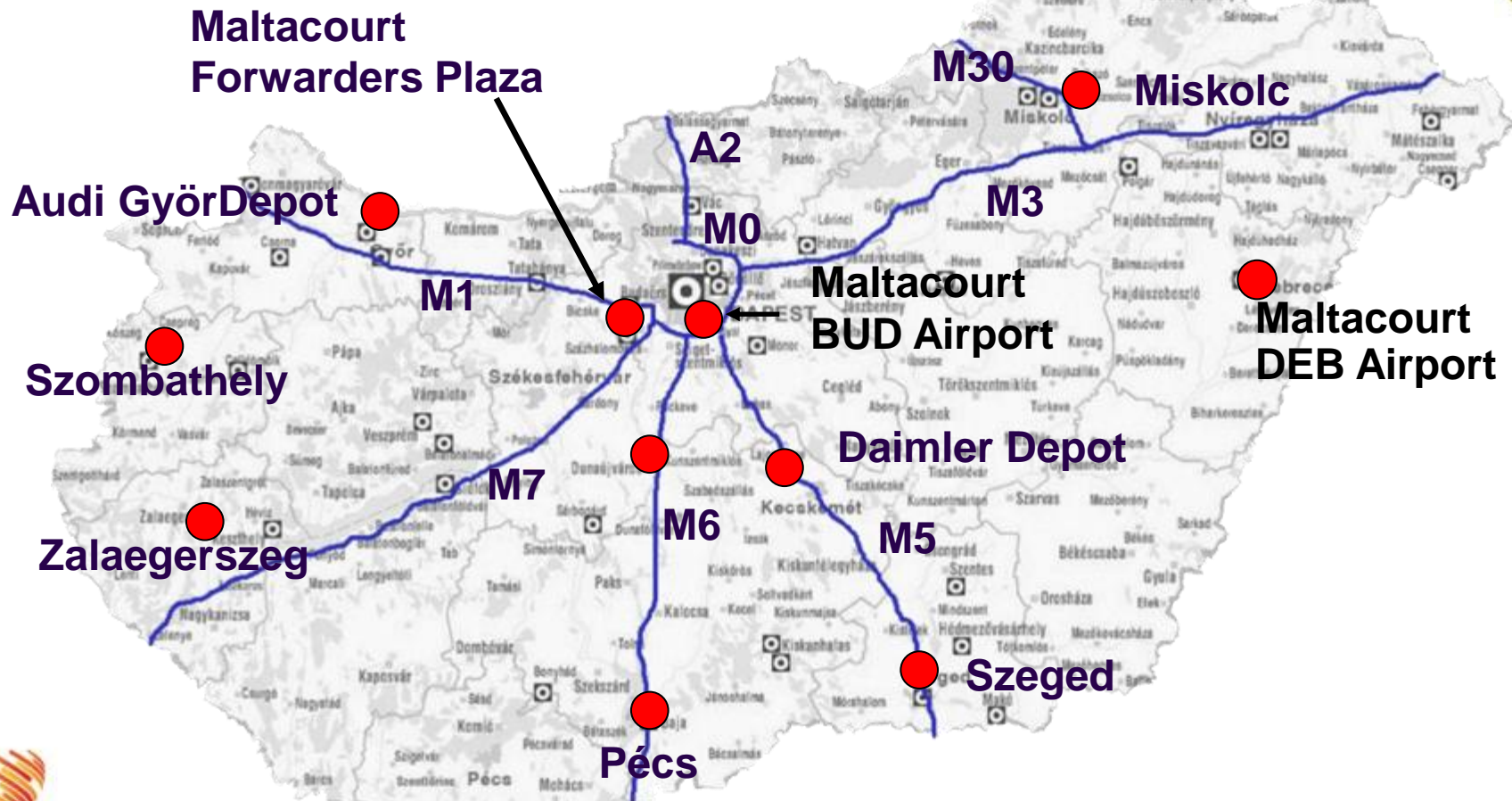
Automotive Industry

- The most successful industry in terms of Foreign Direct Investment
- 10% of Hungary's GDP
- 21% of Hungary's Exports
- Number of companies: cca. 700
- Number of employees: cca. 115,000
- Forecast: more than 2.3 million engines and 400,000 passenger cars will be manufactured in Hungary in 2014
- Major OEMs in Hungary: Audi, General Motors, Suzuki, Daimler Mercedes



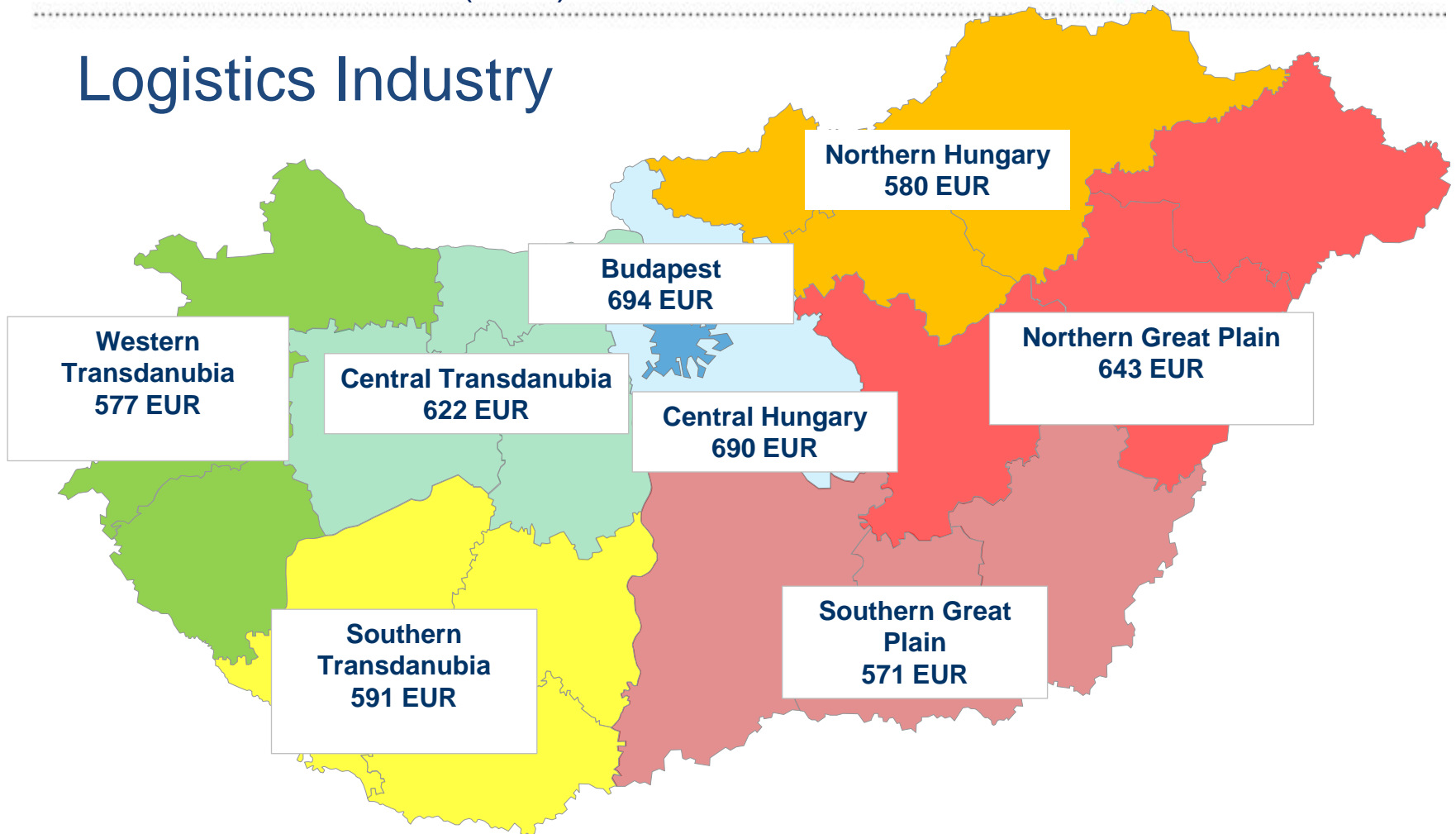
Maltacourt Hungary

Located for Speed & Coverage



Average Monthly Gross Wages (EUR)

Logistics Industry





forwarders plaza

- 44,000 sq meter campus, 6,600 sq meter category A offices
- Most Secure Warehouse in Hungary
- High Security Facility TAPA FSR A+ & AEO Compliant
 - SmokeCloak enabled (High Capacity)
 - CCTV, ultra high security below ground & document storage
 - Fully temperature and humidity controlled- In rack sensors



Strategic Intentions



- Be industry acknowledged leaders and innovators
- Invest in excellence, be Independent
- Commit to and support strategic relationships with partners who contribute to our vision
- Focus on key niche markets
- Use innovation and value add to differentiate
- Underpin with a solid fiscal strategy & governance
- A customer and people focused business

Domestic Services Hungary



- **Leading Pharmaceutical Distribution network +/- 0.5 °C**
- **Largest ADR Class 1 Fleet in Hungary**
- **Security Transport / Cash / Vaccines**
- **Third largest Chilled Distribution network in Hungary**
- **24 hour NATION WIDE FMCG distribution network**
- **X-Dock Hubs in strategic locations**
- **Export Groupage collection through national network**
- **Project Cargo Management services. Own staff Signalmen and Crew boss's**



Time Critical Market Leader In Hungary

- Regulated Agent = Speed
- Own Air Side Customs
- Own Fleet fully equipped vehicles
- 24/7 365 days a year
- Trained Hand Carry Couriers
- Bonded Airport Warehouse
- Own Transit Guarantee



We take it personally, We deliver it professionally

Project Cargo

- Core Competence
- Own equipment
- Air, Ocean & Road
- High complexity projects
- Project management
- Door service globally

Heavy Freight Charter



Out Of Gauge



ADR fleet



Pharma fleet



Summary

- We have had a presence in Hungary for almost 10 years
- As a UK owned business we integrate easily into a recognisable business environment
- We take advantage of the excellent road network
- We are a niche provider, and so fit in perfectly with the specialist markets
- We have experience looking after sensitive products and projects
- We are people that can be trusted with your business
- We continue to be proud of our HU operation and are investing further for our future there





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Thank you for your kind attention

