

OVERVIEW

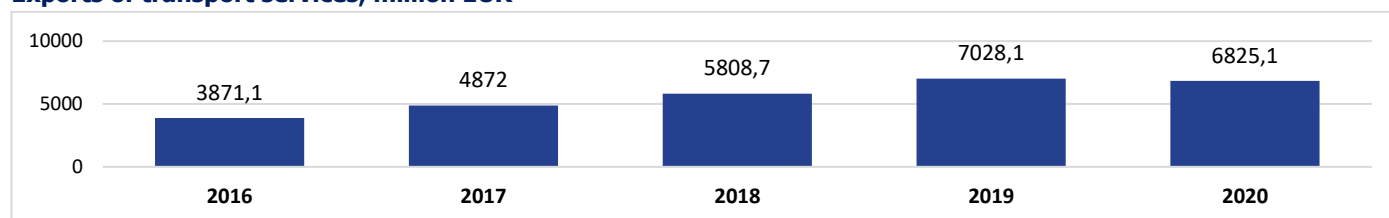
- ▶ The transport and logistics industry accounted for about 15% of GDP in 2019. At the beginning of 2021 this industry has been employing around 139 thousand persons or 15% of the total employment.
- ▶ 8,479 enterprises were active in the industry at the beginning of 2021 and 99% of them were small and medium sized enterprises (SMEs) with 1-249 persons employed.

Indicator	2017	2018	2019	2020	2021
Number of enterprises	8,012	8,100	8,342	8,545	8,479
Number of employees	107,226	110,987	113,113	128,747	138,930

Source: Statistics Lithuania.

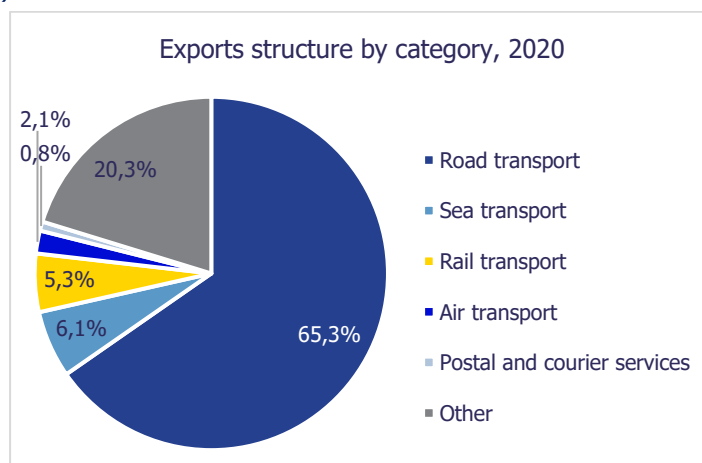
- ▶ In 2020 the largest category in exports of services remained to be transport services and its share in total exports of services increased from 60% in 2019 to 63% in 2020. During the period of 2016-2020 the exports value of transport services increased by 3.0 billion EUR (or 76%) or by an average 15% annually. Lithuania is strongly specialized in this sector.

Exports of transport services, million EUR



Source: Bank of Lithuania.

- ▶ In 2020 the exports of transport services slightly decreased - by 203 million EUR (or 2.9%) - and the exports value amounted to 6.8 billion EUR. In 2020 the exports value consisted mainly of road transport (65%), sea transport (6.1%), rail transport (5.3%), air transport (2.1%), postal and courier services (0.8%) and other services (20%). In 2020 postal and courier services was the fastest growing subsector – the exports value increased by 11 million EUR (or 23%) up to 57 million EUR. Sea transport was the second largest growing subsector whereas exports value of all other transport categories has decreased during 2020.
- ▶ In 2020, for the fourth year in a row, the largest exports market for Lithuanian transport services was Germany (18%), followed by France (11%), Russia (9.6%) and the Netherlands (6.2%). Germany was also the fastest growing market for the exports of Lithuanian transport services in 2020 - the exports value increased by 70 million EUR (or 6.1%) to 1.2 billion EUR, followed by Poland – the exports value increased by 38 million EUR (or 24%) to 195 million EUR, whereas the largest decline was recorded for Russia – exports value decreased by 106 million EUR (or 14%) to 657 million EUR.



Source: Bank of Lithuania.

- ▶ In terms of cargo transportation the highest growth per year is observed in road transport – increased by 6.2 million tons (or 6.2%) up to 107 million tons), whereas the largest decline was recorded for pipeline transportation – the throughput of crude oil and product pipelines decreased by 2.9 million tons (or 24%) to 9.4 million tons due to COVID-19 pandemics and significantly reduced demand of petroleum products in the market.
- ▶ A significant decrease in cargo transportation was recorded for Būtingė Terminal – decreased by 1.7 million tons or 18% to 7.9 million tons in 2020 compared to 2019. At the same time an increase of cargo transportation was recorded for Klaipėda State Seaport – the amount of cargo increased by 1.0 million tons (or 2.2%) up to 47 million tons in 2020. In total 55 million tons of



cargo (1.2% less than in 2019) were handled at Lithuanian seaports. These results were mostly affected by the significant decrease of crude oil and petroleum products cargo - decreased by 3.2 million tons or 19% to 14 million tons.

▶ The year 2020 was a year of challenges for Lithuanian airports due to COVID-19 pandemics. In 2020 Lithuanian airports (Vilnius, Kaunas, Palanga and Šiauliai airports) together served only 1.8 million passengers – 4.7 million passengers or 72% less than in 2019.

Strengths of Lithuanian transport and logistics sector:

- ▶ Well-developed logistics infrastructure;
- ▶ Business experience in Western Europe and CIS countries;
- ▶ Excellent geographical location for European distribution centers;
- ▶ Innovative and complex logistical solutions.