

March 2023. Sector snapshot

Logistics

in Catalonia

Logistics in Catalonia | Sector-based snapshot

ACCIÓ

Regional Government of Catalonia (Generalitat de Catalunya)



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Execution

ACCIÓ Strategic and Competitive Intelligence Unit

Barcelona, March 2023

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Logistics in Catalonia

The logistics sector worldwide

Logistics activities (I)

Logistics is the supply chain segment where the **planning, implementation and control** of the transport of goods, services and **information**, as well as their **storage**, is carried out. Companies in the logistics sector carry out a **wide range of activities**: from direct distribution to the design and management of the entire logistics chain.



At present, highly competitive markets and consumer demands resulting from the expansion of *e-commerce* have transformed logistics into a key component of the **production and marketing process**. Thus, a tendency has been established to concentrate global logistics activity in a **few operational and decision-making centres**, which has generated some rivalry between the regions that fight to host them. An ideal location between production and distribution markets is crucial to **optimise costs**.

Source: ACCIÓ based on "TROP Sectorials núm. 3: La capacidat logística de la indústria" (The logistics capacity of industry) by the AMB and the Cerdà Institute, June 2018; Port of Barcelona

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Logistics activities (II)

After the crisis caused by the COVID-19 outbreak in 2020, the pent-up demand for goods and the rise of e-commerce have driven a **rapid upswing in freight transport**.

Between 2016 and 2021, **China** remained **the largest and fastest growing transport and storage market** in absolute terms. Solid growth is forecast for the period 2021 to 2026, driven by factors such as investments in mobility infrastructure and logistics capacity or international reliance on Chinese goods.

The major economies of **Western Europe** will continue to be **strong contributors to the growth of the sector worldwide**, thanks to high demand for products and well-developed logistics infrastructures and capabilities. Furthermore, they have experienced **growth in demand for logistics and storage activities** thanks to factors such as booming consumer spending, the expansion of e-commerce and the relocation of manufacturing closer to major European markets.

These trends had benefited **Eastern European countries**, such as Poland, Romania and Slovakia, but uncertainty over **the war in Ukraine could reduce their appeal**.

Logistics on a global scale

The global transport and storage industry fully recovered from the COVID-19 crisis in 2021.

Globally, the transport and storage industry has remained highly concentrated.



China and the United States are the two major global players in this sector.



In China, the industry enjoyed a **rapid recovery** from the COVID-19 crisis.



The post-pandemic recovery has been **slower** in the United States.

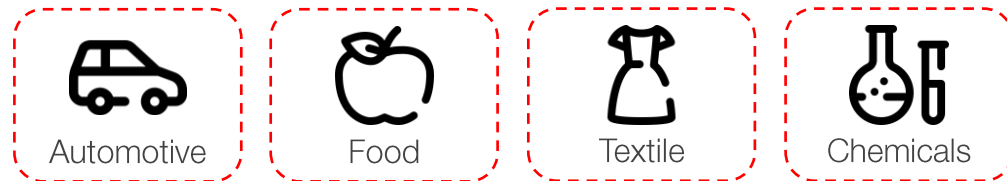
Source: ACCIÓ based on Euromonitor's "Global Overview of the Transport and Storage Industry", June 2022

Logistics in Catalonia

Catalonia, the best location in southern Europe to set up a logistics hub

The economic significance of the logistics sector

The logistics sector has acquired a key importance for economy's competitiveness and has become invaluable for other key industries' prospering in Catalonia.



The impact of the logistics sector on Catalonia's economy is increasingly positive, which bolsters its growing importance.

In 2019, logistics contributed **14.6%** of Catalonia's total **GVA**, equivalent to some €31.37 billion.

In 2019, it accounted for **19.7%** of the **services sector**, which at the same time accounted for 74.1% of the economy as a whole.

In the Barcelona area alone, the logistics sector employs around **128,000 people**.

Between **6 and 8 direct jobs** are created for every 1,000 m² of constructed ceiling of a modern logistics warehouse.

Interesting facts

- The logistics sector grew faster than the Catalan economy as a whole in 2019.
- Transport and storage activities have a significant weight (4.0%), above the European Union average. It is surpassed in countries such as Germany, Italy or France.

The four main logistics assets in Catalonia

1



Industrial and consumer concentration

A sound and specialised industrial ecosystem made up international companies that are highly open to the world, with quick access to a large market.

2



Strategic distribution capacity

An excellent geostrategic position allows efficient intercontinental connections with Asia and America, hence facilitating proximity distribution with southern Europe and northern Africa.

3



Integrated logistics hub

Catalonia is the only region in southern Europe to have a port, airport, free-trade zone and logistics areas with storage capacity in an area of just 12 km.

4



Logistics specialisation

Leading ecosystem with specialised local and international logistics operators, which provide value-added services to sectors such as textiles, chemicals, automotive, pharmaceuticals or e-commerce.

Source: ACCIÓ

Industrial and consumer concentration: the Catalan industrial potential

1



Catalonia is Spain's industrial driver and is home to 34,811 industrial companies, 18.1% of Spain's industrial companies.

Catalonia features a diversified industry, which is the backbone of its economy.



Leading sector

Chemicals and plastics

18.0% of Catalan industrial GVA



Leading sector

Food and beverages

16.1% of Catalan industrial GVA



Leading sector

Automotive and motorbikes

13.4% of Catalan industrial GVA



Leading sector

Metallurgy

11.2% of Catalan industrial GVA



Leading sector

Life sciences

9.0% of Catalan industrial GVA

Industry accounts for 20.1% of Catalan GDP
(17.6% in Spain).

Catalonia is the leading region in terms of exports

Exports in 2022:
€94.927 B

Catalan exports have grown by 17.9% in 2022, up to €94.927 billion, reaching the highest value in the historical series.

Catalonia is the leading exporting region in Spain and accounts for 24.4% of Spanish exports. Moreover, the number of regular exporting companies grew by 2.2%, reaching a total of 17,469.

Source: ACCIÓ based on ICEX

Strategic distribution capacity: a hub for international connections

Catalonia's excellent geostrategic position allows for efficient intercontinental connections with Asia and America as well as quick and easy distribution in southern Europe and northern Africa.



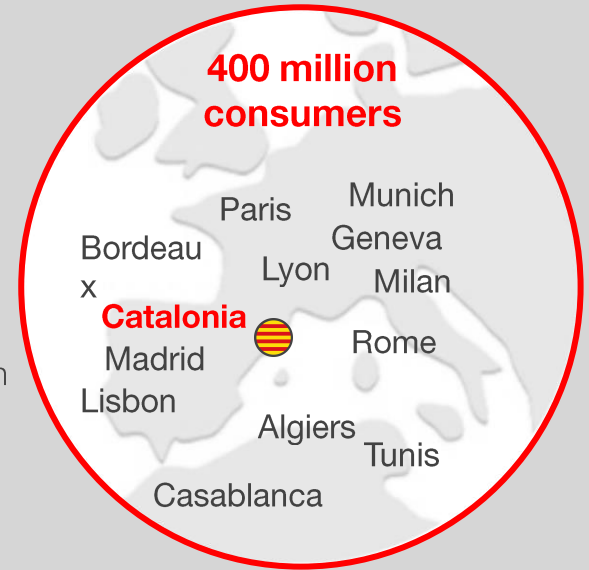
- Barcelona and Tarragona, benchmark ports with 101 regular routes (jointly).**
- In 2021, the Port of Barcelona handled almost 65 million tonnes of goods. Tarragona, just over 31 million.**
- In 2022, Barcelona-El Prat was the second airport in Spain in terms of volume of goods transported.**
- Barcelona-El Prat reached a freight traffic volume of 155,600 tonnes in 2022. This accounts for a year-on-year growth of 14.3%.**
- In 2022, 95.19% of the volume of freight handled in Barcelona-El Prat was transported outside Spain.**

An unmatched distribution capacity

The strategic location and extensive infrastructure network make Catalonia the gateway to southern Europe and the leading distribution centre in the Mediterranean.

The logistics network can reach **400 million consumers** in Europe and the Mediterranean/Africa in less than 48 hours.*

** By all means of transport: air, rail, lorry and ship*



Source: ACCIÓ based on "2021 Annual Report" of the Port of Barcelona, 2021; "2021 Annual Report" of the Port of Tarragona, 2021; Statista, 2023; Barcelona City Council, 2023

Integrated logistics hub (I): two major Mediterranean ports



Catalan ports:
Port of Barcelona
Port of Tarragona

Both ports have services and infrastructures specialising in the handling and dispatch of certain types of products, which fosters their import and export.

Port of Barcelona

- Almost 65 million tonnes of goods with a value of €88.869 billion, accounting for 74% of Catalonia's maritime trade.
- The Port of Barcelona, specialising in general cargo and high value-added goods, connects with 178 ports all over the world via 88 regular routes.
- It offers one of the highest throughput rates in Europe and is a benchmark port in the Euro-Mediterranean region.
- It is the country's leader in terms of value of goods and the most important transport and services infrastructure in Catalonia.



The Port of Barcelona is the 2nd most attractive port for logistics investment, just behind Rotterdam.
 Savills, 2020.



The Port of Barcelona is the only port in Spain with a UIC gauge connection with Europe.
 CIMALSA, 2021.



The Port of Barcelona is the 8th port in the European Union in terms of container traffic.
 Port Economics, 2022.

Source: ACCIÓ based on "2021 Annual Report" of the Port of Barcelona, 2021

Integrated logistics hub (II): five top-level airports



Catalan airports:
Barcelona-El Prat
Reus

Girona-Costa Brava
Lleida-Alguaire
Andorra-La Seu d'Urgell

3



Barcelona-El Prat Airport

- The air cargo centre, covering almost 40 hectares, is integrated into a unique logistics platform in Europe: an area with a radius of 7 kilometres and 2,000 hectares for logistics.
- A total of 155.6 million kg of goods were transported in 2022.
- The top ten ports of destination in 2021 were New York, Mexico City, Shanghai, Seoul, Dubai, Riyadh, Atlanta, Hong Kong, Miami and Bogota.
- The top ten ports of origin in 2021 were Shanghai, Hong Kong, Istanbul, Chicago, Tokyo, Hanoi, Seoul, Lahore, Delhi and Beijing.



Barcelona-El Prat is the third best airport in the world (with 40/50 million passengers).

Skytrax World Airport Awards, 2023.



Barcelona-El Prat is the first international low-cost megahub in Europe and the 12th worldwide.

Official Aviation Guide, 2022.



Barcelona-El Prat is one of the winners of the 2021 COVID-19 Airport Excellence Awards.

Skytrax World Airport Awards, 2021.

Source: ACCIÓ based on "JT Barcelona-El Prat Airport" by Aena, 2021; Barcelona Air Traffic Observatory, 2022



Integrated logistics hub (III): extensive road and rail infrastructure

The Catalan land infrastructure network is divided into three major axes: the Mediterranean corridor, the Ebro axis and the Transversal axis. Good intermodality is thus guaranteed.



Catalan high-speed train:
Figueres-Vilafant
Girona
Barcelona
Tarragona-Reus
Lleida

These are some of the most important Catalan road axes:

AP-2 **A-2** **C-25**
AP-7 **A-7** **C-16**

Part of the European road network runs through Catalonia:

E09 **E15** **E90**



The Catalan road network

- Catalonia is a **leading region in Europe** in terms of high-capacity road infrastructure per surface area unit: 1.5 times higher than the Spanish average and 2.5 times higher than the EU-28 average.
- Catalonia is the **leading Spanish region** in terms of volume of international freight traffic. The main ports of origin and destination, by tonnes and km, are as follows:



The Catalan railway network

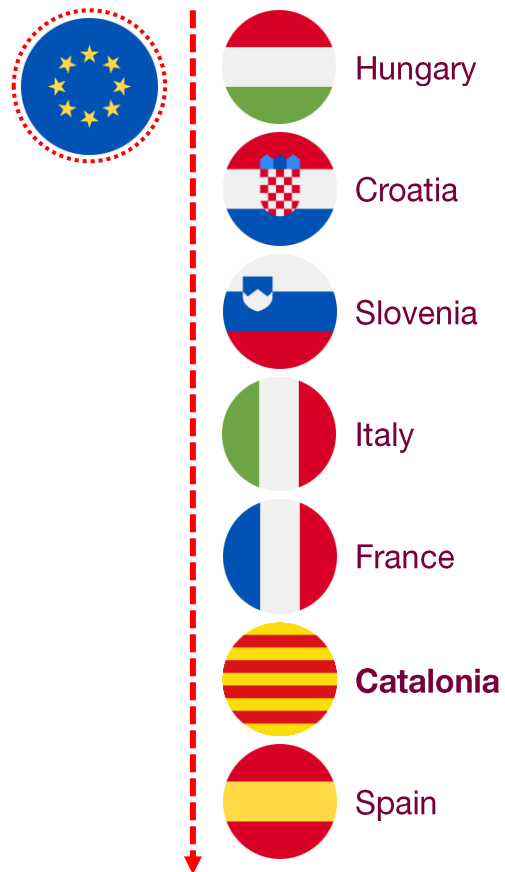
- Catalonia boasts an **extensive railway network** of almost 1,800 km, which connects the main cities of Catalonia with the rest of Spain and France.
- The section from the Port of Barcelona to the French border features a **European gauge**, which has fostered international traffic. The main ports of origin and destination, by tonnes and km, are as follows:



Source: ACCIÓ based on "Els indicadors de competitivitat del Sistema Logístic Català" (Competitiveness indicators of the Catalan Logistics System) by CIMALSA, October 2020; "Estratègia Logística per a la Internacionalització de l'Economia Catalana" (Logistics Strategy for the Internationalisation of the Catalan Economy) by CIMALSA, February 2021; Ministry of Transport, Mobility and Urban Agenda, 2021; Idescat, 2019

Integrated logistics hub (IV): the Mediterranean corridor, a priority investment

3



A section of one of the nine priority corridors of the Trans-European Transport Network runs through Catalonia. Its completion is key, given that it will strengthen Catalonia's competitiveness and its productive fabric.

The Mediterranean corridor is an intermodal axis that combines rail, road, port, airport and logistics infrastructures, as well as the passenger and freight services that circulate along them.

With a total length of 11,410 km, it will connect Algeciras with the Hungarian-Ukrainian border. Several points along its route will intersect with other priority corridors, thus making it one of the most interconnected corridors in Europe. It is scheduled for completion in 2030.



The supply of logistics land in Catalonia is largely concentrated along the Mediterranean corridor. It therefore has enormous potential for development in the medium to long term.



Its completion is expected to increase the share of container use in rail transport. As a result, private operators will gradually gain more weight.



The review promoted in December 2021 by the European Commission aims to strengthen the contribution of transport policy to the objectives of decarbonisation and digitisation.

Source: ACCIÓ based on "Estratègia Logística per a la Internacionalització de l'Economia Catalana" (Logistics Strategy for the Internationalisation of the Catalan Economy) by CIMALSA, February 2021; "5th Mediterranean TEN-T Corridor Work Plan" by the European Commission, September 2022

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Integrated logistics hub (V): several complementary infrastructures

Catalonia boasts an extensive network of additional logistics infrastructures, both public and private, which allow for quick and efficient connection and transport.



Note: There may be additional infrastructure not included in the study

Source: ACCIÓ based on "Els indicadors de competitivitat del sistema Logístic Català" (Competitiveness indicators of the Catalan logistics system) by CIMALSA, 2017; Adif, 2022; Panattoni, 2022



Logistics specialisation (I): the Catalan logistics ecosystem

Multi-sector logistics operators (LO)

Automotive and motorbike LOs

Chemicals and plastics LOs

e-commerce LOs

Electronics LOs

Energy LOs

Machinery LOs

Food and beverage LOs

Pharmaceuticals LOs

Metal LOs

Textiles and fashion LOs

Note: This slide is a partial and illustrative representation; there may be other companies that have not been included in the study

Source: ACCIÓ

Logistics specialisation (II): the Catalan logistics ecosystem



Catalonia, an attractive location for startups

Catalonia features an important startup ecosystem that is continuously growing and has been recognised internationally.

In 2022, Barcelona was the:

- 5th best ecosystem in the EU in which to set up a startup.
- 2nd favourite EU hub of founders for setting up a startup.
- 2nd EU hub with the highest number of startup founders among alumni from local universities.
- 7th EU startup hub in future unicorns. (*)

(*) A **future unicorn** is a tech company valued at more than \$250 M but less than \$1 B



4



Logistics specialisation (III): the Catalan logistics ecosystem

Supporting institutions and associations

Trade fairs and congresses

Leading destination

 Barcelona is the 4th best city to hold congresses of international associations. ICCA Ranking, 2021.

R&D centres

Note: This slide is a partial and illustrative representation; there may be other organisations or trade fairs that have not been included in the study

Source: ACCIÓ



Logistics specialisation (IV): leading companies choose Catalonia

Several major companies have established operations centres in Catalonia, some of which have become hubs for supplying Europe, North Africa, Latin America, Asia and the Middle East.

Here are some of them:

Companies in the logistics sector

Companies from other sectors

(*) Acquisitions: the first company is the acquiring company, the second company is the acquired one

Source: ACCIÓ

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4



Logistics specialisation (V): leading companies choose Catalonia



Kiabi

Kiabi's Catalan logistics centre covers Spain, Portugal, Italy, Morocco and the south of France.



Ikea

Its e-commerce distribution centre for Spain, Portugal and the south of France is headquartered in Catalonia.



Decathlon

Decathlon features a benchmark logistics centre in southern Europe at the Port of Barcelona.



Nissin Corporation

Catalonia is the only place in Spain and southern Europe where Nissin Corporation is present.



AkzoNobel

AkzoNobel's Catalan hub serves the 125 distribution centres in Europe, the Middle East and Africa.



Checkpoint Systems

Checkpoint Systems will manage products aimed for Europe, the Middle East and Africa at the new hub in Terrassa.



Mango

Mango's global logistics centre in Catalonia centralises distribution to its 2,200 shops in 110 countries.



Inditex

The three global logistics centres in Catalonia centralise the receipt of goods and delivery to the shops.



Henkel

Henkel has chosen Catalonia to establish its benchmark logistics centre for southern Europe.



Vente Privée

Veepee has installed its distribution centre and digital factory for the whole of southern Europe in Catalonia.



Seat/Volkswagen

Seat Components' distribution centre is located in Catalonia.



ManoMano

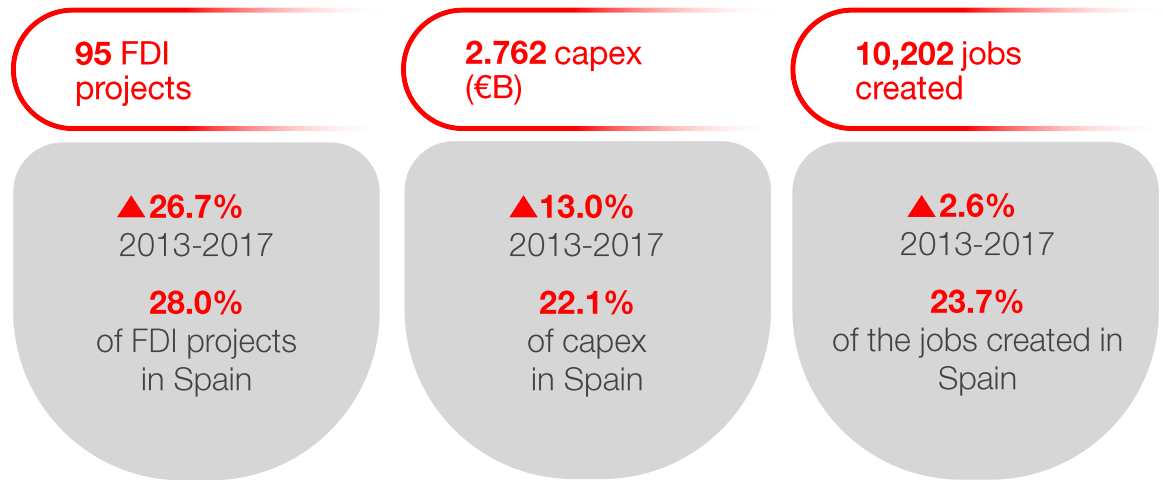
Catalonia is home to ManoFulfillment's logistics centre in Spain and Portugal.

Source: ACCIÓ

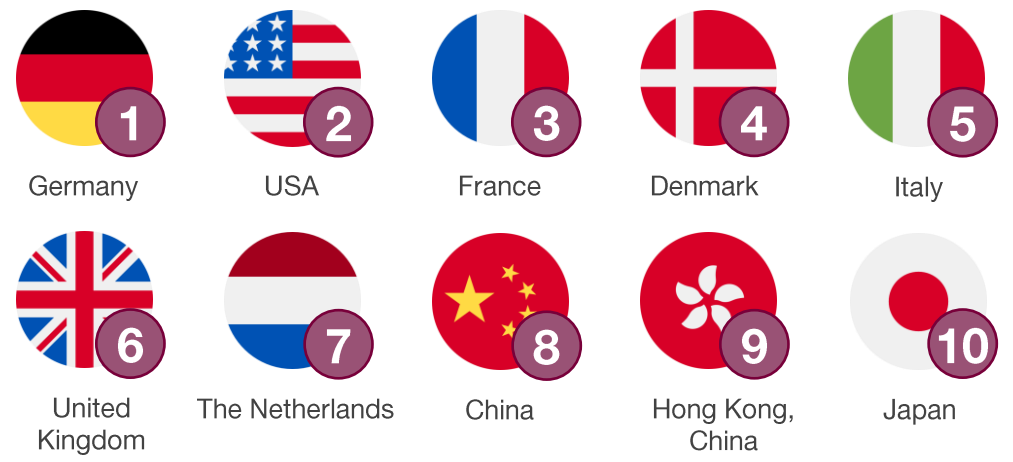


Logistics specialisation (VI): leading logistics FDI destination in Spain

Between 2018 and 2022, Catalonia was the leading logistics FDI destination in Spain.



Main countries of origin of investments by number of projects



- 75 companies have invested in the Catalan logistics sector in the last five years.

Some of the companies investing in Catalonia over the 2018-2022 period



Note: investments in logistics, distribution and transport activities have been taken into account; data for 2022 is provisional
 Source: ACCIÓ based on fDi Markets, 2018-2022

Logistics specialisation (VII): benchmark of excellence in logistics training



Universities offering studies related to logistics



Degrees in ...	Master's Degrees in ...
Logistics and Maritime Business UPF	Logistics and International Trade UB
Business Logistics UdG	Logistics and Supply Chain Management UAB
Engineering in Industrial Organisation and Logistics UdL	Logistics, Supply Chain and Maritime Business UPF
Nautical and Maritime Transport UPC	Customs Law URV
Specialisations and postgraduate courses in ...	Logistics Management UOC
Global Logistics and Transport UOC	Logistics Management URL
Production and Logistics Management UNED	Logistics and International Trade UAO CEU

Leading centres for business and executive studies



Source: ACCIÓ

Logistics in Catalonia

Opportunities in the logistics sector

The future of the logistics sector

Trends in the logistics sector

1



Shift towards sustainability

Companies are committed to decarbonisation and more sustainable transport and warehousing systems.

2



Rise of digitisation and automation

There is great potential to reduce costs and optimise transport and warehousing operations.

3



Production relocation and supplier diversification

Supply chains are diversifying and production is relocating.

4



Rise of e-commerce and demand for last-mile services

The e-commerce boom has boosted demand for last-mile services.

Issues affecting the logistics sector

A

The current stress on global supply chains will keep the logistics sector under pressure.

B

Companies will experience an increase in operating costs, which they will pass on to their customers to ease the pressure on profit margins.

C

In the short to medium term, a slowdown in economic growth is expected to have a negative impact on demand for transport services.

Source: ACCIÓ based on Euromonitor's "Global Overview of the Transport and Storage Industry", June 2022

International business opportunities in the logistics sector



Business opportunities in the logistics sector have been identified in a total of **eleven countries**.



Mexico

E-commerce is growing and internet penetration is expected to increase.



Singapore

It is a prime location for major logistics companies.



Hong Kong, China

Logistics hub with cutting-edge physical and digital infrastructure.



USA

E-commerce initiatives are emerging that facilitate access to new buyers, both B2C and B2B.



Brazil

The Pró-Brasil programme and the entry of private capital will improve equipment and management systems.



Slovenia

It has prioritised the creation of a logistics hub for companies interested in entering the EU.



United Arab Emirates

It is among the five largest logistics markets in the world.



Colombia

This is an industry with a regional presence, a strategic location and a middle class that consumes more online.



Kenya

Work is underway to digitise the transport and logistics sector, as well as infrastructure development.



Panama

It has positioned itself as a benchmark in the logistics and international trade sectors.



France

Digitisation of independent trade upsurged in 2020.

Source: ACCIÓ

Thank you!

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 @accio_cat

 @catalonia_ti

More information about the sector, news and opportunities:

<https://catalonia.com/key-industries-tecnologies/mobility-transportation>

