12th SIL 2022 LOGISTICS CIRCLE BAROMETER TO BE HELD FROM MAY 31st TO JUNE 2nd, 2022

Covid-19 has given logistics visibility as a sector of prime necessity among citizens

- 1,032 Logistics and Supply Chain managers have taken part in the SIL 2022 Logistics Circle Barometer and revealed that quality is the most highly valued aspect when it comes to subcontracting a logistics service (82.4%).

- Approximately 2 out of 3 companies in the sector are committed to the Sustainable Development Goals of the United Nations 2030 Agenda.

- The investment forecast for industrial companies to adapt to Industry 4.0 over the next 5 years is increasing and just over half of the sector is in favor of the implementation of the 44-tons directive in transport.

Barcelona, March 31st, 2022. – The twenty-second edition of the Leading Trade Fair for Logistics, Transport, Intralogistics and Supply Chain in Southern Europe, SIL 2022, has carried out the XII Barometer Logistics Circle 2022 survey in which it analyzes the logistics sector in depth. This study has counted on the collaboration of 1,032 Spanish Logistics or Supply Chain managers from different sectors of the industry who have participated as members of the SIL 2022 Logistics Circle. The profile of the sector of activity of the different Logistics or Supply Chain directors or managers who participated in this XII SIL Logistics Circle Barometer has been as follows:

Departamento de Comunicación Corporativa CZFB
lluis.lopez@zfbarcelona.es
Tel. 609358475

2022

WHAT IS YOUR SECTOR OF ACTIVITY?

FOOD AND DRINKS	18,2
MASS-MARKET RETAILING	15,9
CHEMICAL	14,6
PHARMACEUTICAL AND HOSPITAL	10,5
ELECTRONICS	6,8
HEALTH AND COSMETICS	6,4
ENERGY AND ENVIRONMENT	5
FASHION AND ACCESSORIES	4,5
AUTOMOTIVE	4,5
EQUIPMENT AND MACHINERY ASSETS	3,2
STEEL AND METALLURGY	2,7
CONSTRUCTION AND REAL ESTATE	1,4
SPORT	0,9
HOME	0,9
OTHERS (HARDWARE, PAPER AND ADVERTISING CLAIM...)	4,5

Covid-19 and eCommerce have given logistics visibility

In recent years, the previously unknown logistics sector has become an industry considered by everyone to be a key sector of prime necessity for the economy. One of the great novelties of the XII SIL Logistics Circle Barometer is that for the first time Spanish industrial companies have been asked about the factors that have contributed the most to the visibility of logistics as a sector of prime necessity among the public. And the results highlight two fundamental causes above all: the **Covid-19 pandemic** with **46.3%** and the **rise of eCommerce** with **41.6%.** A **10.4%** of logistics and/or supply chain managers in Spanish industry also consider that the **microchip supply crisis** has contributed to this, while only **1.7%** point to other causes such as the **lack of professionals** in the sector, **reverse logistics** or **shortages**.

Departamento de Comunicación Corporativa CZFB
lluis.lopez@zfbarcelona.es
Tel. 609358475

2022

SIL Barcelona

WHAT ASPECT HAS CONTRIBUTED MOST TO RAISING AWARENESS OF LOGISTICS AS A SECTOR OF BASIC NEED AMONG THE CITIZENSHIP?

THE COVID-19 PANDEMIC	46,3
THE RISE OF E-COMMERCE	41,6
THE MICROCHIP CRISIS	10,4
*OTHERS	1,7

Decreased appreciation of the importance of the Logistics Manager

Another of the conclusions drawn from the 12th SIL 2022 Logistics Circle Barometer is that more than half of Spanish industrial companies (55.2%) value the figure of the logistics manager as a very important part of their organization. However, this figure decreases by 2.5% compared to the last edition of this study conducted in 2020.

26.9% of respondents believe that the CEOs of the companies in which they work consider the role of the logistics manager to **be fundamental**. This figure is 7% lower than that registered in 2020 but 7.8% higher than that registered in 2019. At the same time, 28.3% believe that the CEOs of their companies consider this role to be **quite important**, a figure that is 4.5% higher than in the last edition of this Barometer. Finally, 21.1% say they are valued **fairly** (29% in 2020), 23% say **they should be valued more highly** (23.8% in 2020) and only 0.7% say **they are not valued** at all in their company (0.8% in 2020).

2022

SIL Barcelona

IS THE DIRECTOR OF LOGISTICS WELL-REGARDED BY THE GENERAL DIRECTORATE OF COMPANIES?

YES, IT IS FUNDAMENTAL	26,9
YES, IT IS VERY IMPORTANT	28,3
RIGHT ON	21,1
NO, IT SHOULD BE MORE VALUED	23
NO AT ALL	0,7

Departamento de Comunicación Corporativa CZFB
lluis.lopez@zfbarcelona.es
Tel. 609358475

The importance of leadership and team management

20.9% of the logistics or supply chain managers who participated in this edition of the Logistics Circle Barometer consider that the main attribute that a good logistics manager must have is **the ability to be a leader and know how to manage teams**. And the second most valued attribute is **having a strategic vision** (16.6%).

These data contrast with those obtained in the previous edition of this study when the attribute of **being analytical** was the most valued. Now 13.9% still rate this characteristic in third place as essential in a logistics manager, although this figure falls by 11.3% compared to the 2020 study. The same goes for the ability of a logistics manager to be innovative, which reaches 11.7%, a figure that in the previous Barometer was in second place with 22.8%.

Organizational skills (12.5%) come in fourth place, while **negotiation skills**, at 9.1%, are also highly valued. The 1,032 logistics or supply chain managers who participated in the 12th Logistics Circle Barometer also consider it important for a "good logistician" to be **digitally minded** (5.1%), to **have empathy** (5.1%), to **have contacts** (3.2%) and to **be effectively trained** (1.9%).

2022

SIL Barcelona

WHAT IS THE MAIN QUALITY THAT A GOOD LOGISTICS DIRECTOR SHOULD HAVE?

HAVE LEADERSHIP AND TEAM MANAGEMENT CAPACITY	20,9
HAVE A STRATEGIC VISION	16,6
BE ANALYTICAL	13,9
HAVE ORGANIZATIONAL CAPACITY	12,5
BE INNOVATIVE	11,7
BARGAINING POWER	9,1
HAVE EMPATHY	5,1
HAVE A DIGITAL MINDSET	5,1
HAVE CONTACTS	3,2
HAVE A GOOD TRAINING	1,9

Departamento de Comunicación Corporativa CZFB
lluis.lopez@zfbarcelona.es
Tel. 609358475

Automated operations will shape the logistics of the future

Another of the conclusions that can be drawn from the 12th edition of the SIL Logistics Circle Barometer is that Logistics or Supply Chain managers in Spanish industry consider that the most important aspect of logistics in the future will be **the automation of operations (32.1%),** followed by **collaboration in transport (26.4%)** and the **exchange of standardized information (24.1%).**

Warehousing collaboration (7.7 %) and **service customization** (7.4 %) occupy fourth and fifth place in this ranking, respectively. A 2.3 % of the Logistics or Supply Chain managers of the Spanish industry who have participated in this study point out other aspects that will be key elements as is the **case of blockchain**, **regularization of transport**, **promotion of multimodal transport, professionalization of personnel, coordination and technology associated with robotics, collaboration of the different links in the supply chain or the challenge of solving the problem of offshoring**.

Departamento de Comunicación Corporativa CZFB
lluis.lopez@zfbarcelona.es
Tel. 609358475

2022

SIL Barcelona

WHAT ASPECTS WILL BE ESSENTIAL IN TOMORROWS LOGISTCS?

COLLABORATION IN MATTERS OF TRANSPORT	26,4
EXCHANCE OF STANDARD INFORMATION	24,1
COLABORATION IN MATTEROS OF STORAGE	7,7
THE AUTOMATION OF OPERATIONS	32,1
PERSONALIZATION OF THE SERVICE	7,4
*OTHERS	2,3

*Blockchain, regularization of transport, promotion of multimodal transport, professionalization of personnel, coordination and technology associated with robotics, solve the problem of relocation, collaboration of the different links in the supply chain.

Increase of investment forecast for the next 5 years

Regarding the investments planned by companies for the next 5 years in order to adapt to the 4.0 economy, it should be noted that these are significantly higher than in the last barometer carried out in 2020. **54.3%** of logistics and/or supply chain managers in Spanish industry say that their companies **will invest less than one million euros** to adapt to the 4.0 economy, a figure that is down by 10.3%.

However, as the range of investment increases, logistics and/or supply chain managers express the willingness of their various companies to increase investment. **32.1%** say they will invest an amount **ranging from €1 million to €5 million**, up 8.2% from the 2020 study. The same is true for companies with an investment **forecast of between 5 and 10 million euros**, which on this occasion represent **5.6%** whereas in the last edition of this study they represented 3.5%.

Departamento de Comunicación Corporativa CZFB
lluis.lopez@zfbarcelona.es
Tel. 609358475

Another **5.6%** of those surveyed said that their companies will invest **between 10 and 50 million euros**, a figure very similar to that of 2020. Likewise, the number of companies that plan to invest **more than 50 million euros** in the current edition is **2.4%**, a figure that represents an increase of 0.6% compared to 2020.

2022

SIL Barcelona

WHAT INVESTMENT HAS YOUR COMPANY FORESEEN FOR THE NEXT 5 YEARS TO ADAPT TO THE 4.0 ECONOMY?

LESS THAN € 1,000,000	54,3
FROM € 1,000,000 to € 5,000,000	32,1
FROM € 5,000,000 to € 10,000,000	5,6
FROM € 10,000,000 to € 50,000,000	5,6
MORE THAN € 50,000,000	2,4

Two out of three companies are involved with the SDGs

Another of the conclusions of the 12th SIL 2022 Logistics Circle Barometer is that **72.3%** of Spanish industrial companies say they are committed to the United Nations Sustainable Development Goals within the timeframe of the 2030 Agenda. This figure represents a drop of **6.1%** compared to the previous barometer conducted in 2020. In addition, **6.4%** of the companies that participated in the study say that their companies **are not at all committed** to the SDGs, a worrying figure given that in 2020 no company was detected that did not have a minimum level of involvement in this regard.

29.8% of the logistics and/or supply chain managers who participated in this study say that their companies **carry out many actions** aimed at achieving the SDGs and are therefore fully involved in this aspect. This figure is very similar to that registered in the previous edition, with a slight decrease of 0.4%. On the other hand**, 42.5%** say that their companies carry out **quite a lot of actions** to achieve the Sustainable Development Goals, which is 5.7% less than in 2020. Finally, **21.3%** (0.3% less than in 2020) say that they are not very committed to the United Nations SDGs.

Departamento de Comunicación Corporativa CZFB
lluis.lopez@zfbarcelona.es
Tel. 609358475

2022

IS YOUR COMPANY COMMITTED TO THE SDG OF THE 2030 AGENDA UNITED NATIONS?

YES, A LOT	29,8
YES, QUITE	42,5
LITTLE	21,3
NOTHING	6,4

Quality and flexibility are the most valued features

Quality continues to be the aspect most highly valued by the Logistics or Supply Chain managers of Spanish industrial companies when outsourcing logistics services, at **82.4%,** a figure that is 6.9% higher than in the previous edition of this study.

The second most valued aspect is **flexibility** at 61.1%, followed closely by **experience and confidence** at **59.2%,** both figures are practically identical to those registered in the previous Barometer.

For its part, the **savings** the company will make by outsourcing a particular logistics service or product remains in fourth place with a figure of 48.4%, a decrease of **6.9%** compared to the study carried out in 2020. Particularly significant are the increases experienced by **specialization 31.4%** (+4.8%) and **speed 29.6%** (+10%), aspects that

Departamento de Comunicación Corporativa CZFB
lluis.lopez@zfbarcelona.es
Tel. 609358475

appear in fifth and sixth place. **Business optimization** (9.4%) and **HR and training** (5.6%) close this ranking of the aspects most valued when outsourcing logistics services.

2022

SIL Barcelona

WHAT ASPECTS DO YOU VALUE MOST WHEN OUTSOURCING A LOGISTIC SERVICE?

QUALITY	82,4
SAVINGS	48,4
EXPERIENCE & RELIABILITY	59,2
FLEXIBILITY	61,1
SPECIALIZATION	31,4
SPEED	29,6
BUSINESS OPTIMIZATION	9,4
HR & EDUCATION	5,6

Service and quality are also major logistical concerns

Service and quality (21.5%) are placed as the main concerns of Spanish shippers instead of **efficiency and optimization of costs and stocks** (18.9%), which are in second position. While the figure for service and quality is exactly the same as it was in the previous survey, the figure for efficiency and cost and stock optimization is down 3.7%.

The third biggest worry for 13.9 % of the logistics or supply chain managers who took part in this study was **speed, punctuality and commitment** of logistics companies. **Communication and information (control technologies)** at **7.3 %** (down 5.1%), planning at 7.1% (up 2.8%) and **sustainability** at **6.1%** (up 0.8%) also rank highly.

Although they do not appear in the first places, it is worth mentioning that concerns about **current uncertainty** and the **evolution of the transport sector**, have grown and now stand at **4.3%** (+2.8%) and **4.2%** (+2.3%), respectively. However, the issue of **late payments** in the sector is a topic of practically no concern to anyone, registering only **0.1%** of the cases.

2022

WHAT ARE YOUR MAIN LOGISTICS CONCERNS?

SERVICE AND QUALITY	21,5
EFFICIENCY &COSTS & STOCKS OPTIMIZATION	18,9
SPEED, PUNCTUALITY AND COMMITMENT	13,9
COMMUNICATION AND INFORMATION (CONTROL TECHNOLOGY)	7,3
INNOVATION	4,9
PLANNIFICATION	7,1
SUSTAINABILITY	6,1
4.0 INDUSTRY ADAPTATION	4,2
LOADING AND UNLOADING IN URBAN CENTERS	1,3
RAILWAY INFRASTRUCTURES FOR FREIGHT	1,7
TRANSPORT SECTOR EVOLUTION	4,2
LATE PAYMENT	0,1
CURRENT UNCERTAINTY	4,3
HR	0,7
ATTRACTING HIGHLY COMPETENT STAFF	3,8

Transportation, the outsourced logistics activity par excellence

The most outsourced logistics activity, as has been the case in previous Círculo Logístico Barometers, is undoubtedly **transport.** A total of 96.2% of the 1,032 Logistics or Supply Chain managers who participated in the 12th SIL 2022 Logistics Circle Barometer stated that they outsource their company's **transport services**. This figure, which is slightly higher than that of the previous study (0.8%), places **transport** as the undisputed leader in this category, as it is a long way behind the second most outsourced activity, **distribution**, with 52.8% and experienced a decline of 6.5% in relation to the previous edition.

This question of the XII SIL 2022 Logistics Circle Barometer shows no major changes with respect to the previous edition, maintaining the same order of concerns as last year. The most significant figure relates to **purchasing activity**, which, despite remaining in seventh place at **3.1%,** is down by 5.1%.

Departamento de Comunicación Corporativa CZFB
lluis.lopez@zfbarcelona.es
Tel. 609358475

2022

WHAT LOGISTICS ACTIVITIES DO YOU USUALLY SUBCONTRACT?

TRANSPORT	96,2
DISTRIBUTION	52,8
PACKING AND PACKAGING	27,7
MATERIAL HANDLING & STOCKS MANAGEMENT	24,5
SYSTEMS AUTOMATIZATION	17
PRODUCTION	10,7
PURCHASES	3,1
OTHERS	4,4

Supporters of the implementation of the 44-ton system are on the decline

The 12th edition of the SIL Logistics Circle Barometer shows that 58% of Spanish shippers are **in favor of the implementation of the 44-ton directive** in road freight transport. This figure has decreased by 7.7% compared to 2020.

On the other hand, the number of **those opposed to the 44-ton regulation** has increased in this edition by 2.2% to **10.8%.** The number of respondents who are **indifferent to this issue** has also increased considerably by 5.5% and now represents **31.2%** of the total number of participants in this study.

2022

ARE YOU IN FAVOR OF THE IMPLEMENTATION OF THE 44 TONS OF MAXIMUM?

YES	58
NO	10,8
DON'T KNOW	31,2

Departamento de Comunicación Corporativa CZFB
lluis.lopez@zfbarcelona.es
Tel. 609358475