

# SIL

## Barcelona

### PRESS KIT

The Leading Exhibition for Logistics, Transport,  
Intralogistics, and Supply Chain in Southern Europe

From May 31<sup>st</sup> to June 2<sup>nd</sup>, 2022  
Pavilion 8, Montjuic-Plaza España Venue, Fira de Barcelona

### BARCELONA



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## SIL 2022 FACT SHEET

<b>Name:</b>	The Leading Exhibition for Logistics, Transport, Intralogistics, and Supply Chain in Southern Europe
<b>Organized by:</b>	Consorci ZF Internacional, S.A.U.
<b>Venue:</b>	Montjuic-Plaza España Venue of Fira de Barcelona. Pavilion 8 Avda. Reina Maria Cristina s/n 08004 Barcelona
<b>Character:</b>	Professional
<b>Sphere:</b>	International
<b>Frequency:</b>	Annual
<b>Edition:</b>	22 <sup>nd</sup>
<b>Dates:</b>	From May 31 <sup>st</sup> to June 2 <sup>nd</sup> , 2022
<b>Exhibitor's Schedule:</b>	From May 31 <sup>st</sup> to June 1 <sup>st</sup> from 9:00 am to 8:00 pm and June 2 <sup>nd</sup> from 9:00 am to 7:00 pm.
<b>Visitor's Schedule:</b>	From May 31 <sup>st</sup> to June 1 <sup>st</sup> from 9:00 am to 7:00 pm and June 2 <sup>nd</sup> from 9:00 am to 6:00 pm.
<b>Participating companies:</b>	650 (30% of internationality)
<b>2022 Novelties:</b>	Extremadura Guest Region; Greater commitment to networking with the Networking Circle: Logistics Circle, Retailer Circle, and Start-ups Circle. 1 <sup>st</sup> Summit of Special Economic Zones of the Mediterranean and Africa (MedaLogistics Week).
<b>Sectors:</b>	<ul style="list-style-type: none"><li>- Transportation, logistics, and distribution services</li><li>- Intralogistics</li><li>- Technology and IT</li><li>- Industry 4.0</li><li>- Infrastructure</li><li>- Real Estate Logistics</li><li>- Last mile and delivery in e-commerce</li><li>- Talent</li><li>- Sustainability</li></ul>

## SIL 2022 Novelties

SIL 2022, the **Leading Exhibition for Logistics, Transport, Intralogistics, and Supply Chain in Southern Europe**, celebrates its **22<sup>nd</sup> edition** this year. SIL was born as a Congress 24 years ago, in 1998, and a year later held the first edition of the Trade Fair. Year after year, the trade fair has evolved hand in hand with the sector, becoming faithful to its annual appointment uninterruptedly until reaching its twenty-first edition. Now, after a break forced by the global health situation, this new edition of SIL comes with a renewed image, a new logo, and a greater presence of new technologies that will boost the generation of networking opportunities. To do so, the fair has an app that will facilitate the transmission of data between exhibitors and visitors just by scanning the corresponding QR codes.

## Extremadura, Guest Region

**Extremadura** will be the guest region at SIL 2022. It will have **very prominent participation** in the Leading Logistics, Transport, Intralogistics, and Supply Chain Fair in Southern Europe with a stand where it will showcase all its offer and global logistics potential to promote itself and explain the possibilities it offers to attract new investors and companies to establish and grow within the territory.

Last year, the Regional Government of Extremadura presented the Extremadura Logistics Strategy, a plan to improve the competitiveness of the business network, boost job creation and foster the growth of the regional economy, as well as to guarantee the optimum management of the logistics and freight transport system in the region, ensuring that it is more efficient, viable and sustainable. In a context of collaboration between public and private entities, the Strategy establishes the public lines of action in three-time horizons: 2030, 2040 and 2050, based on Extremadura's logistic strengths, which are essentially its relations with Portugal, the integration of the Atlantic Corridor and the growing export activity of its companies.

The five strategic objectives of the Strategy are: **to establish the definitive configuration of the network of logistics areas; to promote intermodality**, establishing significant intermodal corridors and thus promoting sustainability in transportation and logistics; to propose a model of infrastructure governance; to advance in infrastructure innovation to increase the efficiency and competitiveness of logistics and transportation services; and to promote training and collaboration between logistics and transportation operators, shippers and technological institutions through partnerships.

The development of these objectives, under six lines of action, will provide more than 400 hectares of raw logistics land, which in turn will generate a net investment in urbanization and construction of close to 700 million euros, with associated employment of more than 12,000 jobs.

### MedaLogistics Week

Organized by the Consorci de la Zona Franca de Barcelona and the Association of Chambers of Commerce and Industry of the Mediterranean (ASCAME) with the support of the Barcelona Chamber of Commerce, MedaLogistics Week will celebrate its 18<sup>th</sup> edition on May 31<sup>st</sup> and June 1<sup>st</sup>. MedaLogistics Week hosts the **18<sup>th</sup> Mediterranean Logistics and Transport Forum** and the **14<sup>th</sup> Ports and Maritime Transport Summit**. This new edition will address the post-pandemic situation, promote the importance of the Mediterranean region in the global economy as a whole and address the sustainability needs of the logistics and transport sector in the Mediterranean by the United Nations SDGs. In addition, the partnership between Africa, Europe, and Asia will be fostered, with the Mediterranean at the center, positioned as a major hub for innovation, logistics and transport.

The **18<sup>th</sup> edition of the Mediterranean Logistics, Transport and Ports Summit** will discuss the transformation of the Mediterranean value chain across its constituent regions and the role of the collaborative economy in the Mediterranean logistics sector. It will raise the challenges and key trends that are increasing pressure on retailers and

manufacturers, both in their supply chains and in the underlying economics of delivering goods to the consumer.

On the other hand, the **14<sup>th</sup> Ports and Shipping Summit** will reflect on the role of Mediterranean ports in a evolving world, investment strategies with an impact on port platforms and measures that can be taken by port authorities across the Mediterranean to prevent a catastrophe such as the one that occurred in the port of Beirut in August 2020.

The second day of MedaLogistics Week will highlight the role of the Mediterranean as a meeting point between three major continents: Africa, Europe and Asia. It will do so through the **1<sup>st</sup> Africa Logistics Meeting** and the **1<sup>st</sup> Summit of Special Economic Zones of the Mediterranean and Africa**.

The **1<sup>st</sup> Africa Logistics Meeting** will put a special focus on the role of logistics in economic integration in Africa and will outline key measures to make the most of the African Continental Free Trade Area Agreement. In addition, it will address the state of the African investment market in seaports, outlining the challenges and business opportunities in the sector.

On the other hand, the **1<sup>st</sup> Mediterranean-Africa Special Economic Zones Summit** will raise the potential benefits of Special Economic Zones (SEZs) for Africa and the Mediterranean region. It will also discuss how SEZs are best placed to adapt and integrate innovation 4.0, thereby facilitating ports to better meet their objectives of providing world-class service, facilities and efficiency.

## Innovation, sustainability and talent, the main themes of the SIL Congress

Under the title "**Logistics and e-Commerce: drivers of the economy**", the SIL Congress will bring together more than 300 international speakers on over 80 sessions in 4 different stages: **Business Transformation**, with inspirational speakers, CEOs and senior executives from the industry, retail and logistics sectors will talk about the three macro trends at an economic level; **Industry & Logistics**, where professionals from both sectors will address the main challenges; **eDelivery**, which will bring together experts in e-commerce, technology, marketing, logistics, start-ups, administrations and investors; and **Global Logistics**, a space to reflect on how to boost the recovery of the sector in Europe.

The SIL Congress will be attended by decision makers from major national and international companies such as **Idilia Foods, DAMM, Nestlé, Procter & Gamble, CELSA GROUP, SEAT, BOSCH, Nestlé, Zalando, TOUS, Caprabo, Decathlon, AkzoNobel, Casa Ametller, Getir, Freshly Cosmetics and Mango**, among others.

SIL 2022 maintains the novelty of 2019, the SIL Talks, knowledge agoras located in the exhibition area and where 20-minute conferences will be held.

### SIL 2022 increases its commitment to networking

Another novelty of SIL 2022 is its firm commitment to networking. In this edition we have decided to divide the **Networking Circle** into three categories: **Logistics Circle**, which will bring together the main logistics and/or supply chain managers of the industry's leading companies, **Retailer Circle**, with the presence of the most prominent international retailers, and **Start-ups Circle**, where we will bring together emerging companies with potential investors.

## Startup Innovation Hub

SIL 2022 wants to attract and encourage the participation of all those entrepreneurs and startups that can offer disruptive solutions with an impact on the logistics sector through its Startup Innovation Hub, in collaboration with La Salle Technova.

Participating companies will have the opportunity to present creative and innovative solutions and projects to leading industrial companies, investors, venture capital firms and, in general, to the specialized public of the entire global supply chain who will be present at the main meeting of the logistics sector in Southern Europe and the Mediterranean.

The SIL Startup Innovation Hub is a unique meeting point to create synergies, fostering networking and accessing industry expertise. The ten best proposals will be direct candidates for the SIL awards in the Best Startup Award category, which will be presented during the Logistics Night. In addition, the selected projects will be published in the SIL 2022 startup directory as the best startups of the year.

The 10 finalist startups eligible to participate in the award for Best Startup in the sector are:

- BeChained Artificial Intelligence Technologies SL
- Alterity
- Zeemcoin "Zero Emission Coin"
- Yopidoya
- Estoko Logistics
- Sense
- ClearQuote Inc
- Usyncro
- Feeder
- Gandolapp, S.L.



## The keys to SIL

SIL celebrates its 22<sup>nd</sup> edition after two years of forced absence due to the global health situation, reaffirming its position as the leading logistics event in Spain and the Mediterranean thanks to the interaction of 4 lines of action that have been present since the first edition:

- To be the meeting point for the logistics sector, offering a wide range of quality *networking* opportunities.
- International projection: Year after year SIL attracts more exhibitors and international visitors, becoming a bridge connecting the European market with Latin America, North Africa, the Middle East and the Mediterranean basin, especially the Maghreb area and Southeast Asia.
- To be the true forum for logistics knowledge, a qualified and privileged place for reflection. For this reason, it promotes an outstanding agenda of conferences that take place throughout the days of the fair.
- To bet on new technologies as a strategic factor in the logistics sector and to bring the latest innovations and trends in the sector.

## Sectoral Economic Report

This report is based on data from prestigious studies, reports and articles that have been published throughout the year in different media.

### Transport and logistics represent the 10% of Spain's GDP

According to data from ICEX, a public business entity whose main purpose is to promote the internationalization of the Spanish economy and companies, the logistics and transport sector represents 10% of Spanish GDP. This field of activity moved around 111,000 million euros throughout 2021, generating nearly 1,000,000 jobs. Accordingly, data shows that this is a key sector for the new economy.

### Logistics represent the 14.4% of GDP in Catalonia

According to data from the Logistics Observatory, conducted by CIMALSA, in 2021 logistics already accounted for 14.4% of GDP in Catalonia. Thus, the autonomous community becomes the second European territory with the highest relevance of the logistics sector over the Gross Domestic Product, only behind the Netherlands.

The same study highlights that there are currently 499 startups dedicated to logistics in Catalonia, of which 351 are entirely dedicated to the sector, and they create 3,600 jobs. Sixty percent of them are concentrated in the province of Barcelona. Ecommerce stands out as the main activity of these startups, and 43% of them are linked to this economic activity that includes: e-commerce platforms, online stores, platform managers and marketplaces, lastmile, consolidation centers, intelligent packaging, on-demand shipments, and intelligent lockers.

The Observatory also notes the impact of the health crisis on logistics, with a significant regionalization of logistics chains, as seen in the reduction of traffic in the most distant flows. The value of exports decreased by 10.3% in 2020, breaking the dynamic of the last ten years.

As a new fact, the presence of women in the industry has been observed, and now represent 22% of the employees.

### The logistics sector closed 2021 with an 18.9% increase in turnover

According to data from the National Statistics Institute (INE), in Spain the logistics sector increased its turnover by 18.9% in 2021. However, the average ratios are still lower than those of 2019, despite the fact that the November and December values exceeded the pre-pandemic figures.

The activity that has registered the greatest growth has been warehousing and activities related to transportation, with an annual increase of 26.1%. Likewise, in the month of December, an increase of 35.1% was recorded.

The second fastest growing subsector was air transport, which in 2020 was particularly hit hard by the pandemic. By the end of 2021 it had recorded an increase of 24%, with a revenue growth of 106.2% in December. Notably, maritime transport also grew, closing 2021 with an increase of 19.1% in the revenue.

The railroad sector recorded an increase of 20.7%, compared to the contained growth of postal and courier activities, which registered a rise of 8.9%, despite a decline of 2.7% in December.

### The logistics sector closes 2021 in a situation of full employment

The data published by the EPA (Survey of Active Population) in 2021 demonstrates the good year experienced by the sector, which closed the fourth quarter of the year with an increase of 6.8% over the previous period, five times higher than the total economy. Thus, from October to December, 44% of the jobs created in the economy as a whole were in the logistics sector.

The year-on-year variation of the figure was also very favorable, reaching 6.7%. Thus, at the end of 2021, unemployment in the sector was 4.6%, 8.7 percentage points lower than the unemployment rate for the economy as a whole, meaning it is in a situation of full employment.

The logistics sector ended the year with 1,130,100 professionals, a figure that represents 5% of all those active men and women in the Spanish economy. In terms of gender, 79% of the active employed are men and only 21% are women. By age, the highest concentration is between 45 and 49 years of age (15.8%), followed by 50 to 54 (15.9%) and 40 to 44 years of age (45.8%).

Likewise, the Spanish transport and storage sector had an active population of 1,071,600 people in Q4 2021. This represents an increase of 7.14% compared the Q3 2017, and a 4.15% increase in comparison to Q3 2018.

## Digitalization changes the most in-demand professional profiles the sector

The outbreak of the pandemic and the change in business models have forced the logistics sector and the supply chain to carry out an accelerated transition with a significant implementation of new technologies. This factor has modified the professional profiles most in demand by companies in the sector.

According to a study by Randstad, the most in-demand positions are:

- Warehouse Manager: those in charge of leading teams, managing inventory and planning logistics strategy are especially demanded in large areas such as Barcelona or Madrid, as well as major ports such as Valencia or Algeciras. The average salary range for these professionals is between 24,000 and 32,000 euros per year.
- Sales executive: account executives specializing in the logistics and transportation sector. The areas where there is the greatest demand for these

profiles are the cities of Barcelona, Madrid, Valencia, and Bilbao. In this case, the salary range is between 35,000 and 65,000 euros per year.

- PLC Programmer: In Barcelona and Madrid there is a shortage of professionals in charge of designing control and operation programs for automated machinery used in the logistics sector. For these profiles, the annual salary is between 35,000 and 45,000 euros per year.

### Real Estate contracting reached a record figure of 2.2 billion euros

2021 was a record year for the real estate market, with investment in logistics assets reaching 2.2 billion euros. The contracting levels of these properties exceeded 2,700 million square meters, according to the consulting firm CBRE. Thus, the figure contracted exceeds that of 2020 by 44%.

On the other hand, 912,000 square meters of logistics land were contracted in Catalonia in 2021, 86% of which was net contracting, representing an increase of 118% compared to that recorded in 2020. Global availability stands at 2.4%, with the Central area reaching availability levels around 0%, the first crown at around 2.3%, and the second and third crowns consolidating their positioning given their strategic location, more competitive prices, and also due to the characteristics of the assets, according to Savills.

### Logistics contracting in Barcelona grew by 44% in 2018

Barcelona currently has close to nine million square meters of logistics space. However, today just over 200,000 of them are available, according to data provided by Savills.

Given the continuous good pace of demand, there has been an increase in rents of 5% and great interest has been generated in finalist land and land under management. Likewise, Savills also points to the increase of the pre-let and turnkey due to the lack of available products.

## The sale of forklifts doubles the figures of 2020

The Spanish market for forklifts and handling equipment has exceeded 50,000 machines in the total market in 2021, doubling 24.530 in the year 2020. The record figure so far was that recorded in 2018, which reached 31,143 units.

There have also been developments in the composition of the total market, with more than 16,300 counterbalanced trucks, of which 9,950 are electric and 6,430 thermal, which reflects the change of regulations in the motorization. Last year's indoor teams surpassed themselves, with 34,620 units, the record of 2018. However, it should be noted that 62% of this equipment is of low volume and value.

## XII BAROMETER LOGISTICS CIRCLE SIL 2022

### COVID-19 HAS GIVEN LOGISTICS VISIBILITY AS A SECTOR OF PRIME NECESSITY AMONG CITIZENS

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 includes the responses from 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 respondents of the survey were logistics managers operating in the following sectors:



### 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. The results highlight two fundamental causes contributing most to the rise in this awareness are 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 the 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, and **reverse logistics** or **shortages**.



### Decreased appreciation of the importance of the Logistics Manager

Another of the conclusions drawn from the XII 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 their CEOs 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 the one registered in 2019. At the same time, 28.3% believe that their CEOs consider this role to be **highly important**, a figure that is 4.5% higher than in the last edition of this Barometer. A further 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).





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

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

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**. The **second most valued attribute is having a strategic vision** (16.6%).

This data contrasts with that 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 XII 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%).



## 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

### Automated operations will shape the logistics of the future

According to the survey, Logistics or Supply Chain managers across 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 in Spain 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, the collaboration of the different links in the supply chain or the challenge of solving the problem of offshoring.



**WHAT ASPECTS WILL BE ESSENTIAL IN TOMORROWS LOGISTICS?**

<b>COLLABORATION IN MATTERS OF TRANSPORT</b>	<b>26,4</b>
<b>EXCHANGE OF STANDARD INFORMATION</b>	<b>24,1</b>
<b>COLLABORATION IN MATTEROS OF STORAGE</b>	<b>7,7</b>
<b>THE AUTOMATION OF OPERATIONS</b>	<b>32,1</b>
<b>PERSONALIZATION OF THE SERVICE</b>	<b>7,4</b>
<b>*OTHERS</b>	<b>2,3</b>

Increase of investment forecast for the next 5 years

Regarding the investments planned by companies for the next 5 years 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 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 still express willingness to increase investment. **32.1%** say they will invest an amount **ranging from €1 million to €5 million**, up 8.2% from 2020. The same is true for companies with an investment **forecast of between 5 and 10 million euros**, which on this occasion represents **5.6%** whereas in the last edition of this study the figure was 3.5%.

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.



**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 XII 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. 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.



**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 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 trust** 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 seen in the categories of **specialization 31.4%** (+4.8%) and **speed 29.6%** (+10%), aspects that 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.



Service and quality are also major logistical concerns

Service and quality (21.5%) are placed as the main concerns of Spanish shippers followed closely by **efficiency and optimization of costs and stocks** (18.9%), which are in second position. While the figure for service and quality is 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 top of the rankings, 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.



## 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 by excellence

The most outsourced logistics activity, as has been the case in previous Circle Barometers, is undoubtedly **transport**. A total of 96.2% of the 1,032 Logistics or Supply Chain managers who participated in the XII 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 about the previous edition.

This question of the XII SIL 2022 Logistics Circle Barometer shows no major changes concerning 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%.



## 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 in decline

The XII 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.



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

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



## THE ORGANIZER: THE CONSORCI DE LA ZONA FRANCA DE BARCELONA

The Consorci de la Zona Franca de Barcelona (CZFB), the first consortium established in Spain (1916), is a public entity for economic and social revitalization. Since its creation, it has managed the Zona Franca industrial park and its customs area. It has also prompted a multitude of projects in other parts of the city and the metropolitan area, always linked to high value-added activities with a strong innovation component. In addition, it works to promote the international projection of Barcelona, Catalonia, and Spain in the trade fair, logistics, and new economy sectors. It has more than 10,000,000 m<sup>2</sup> of industrial and urban land at different stages of development.

Its corporate mission is to dynamize the metropolitan area's economy through the management of La Zona Franca Industrial Estate, as well as La Zona Franca customs, generating economic and social value, and raising international awareness. In each historical period, it has contributed to economic and social growth with pioneering initiatives.

The governing and management bodies are made up of representatives from the main economic entities in Barcelona, representatives of the Barcelona City Hall, the Catalan government, and the Spanish Government: the decision-makers reflect its spirit of public-private cooperation.

The CZFB plays an important role in the economic potential of the city of Barcelona and its metropolitan area.

The Catalan capital is the core of the metropolitan region with 2,500 km<sup>2</sup> and almost 5,000,000 inhabitants, 10% of the Spanish population. Its dynamic and diversified economy generates 19% of Spain's GDP and exports (Barcelona in figures).

As a business landing platform for this region, the CZFB manages the large Zona Franca Industrial Park, with 4,700,000 m<sup>2</sup> and more than 170 companies: a global production

platform, with industrial and logistics warehouses that have privileged connectivity, thanks to its easy access to the port, the airport, international road links, and the main freight railway station.

In addition, the entity is a public real estate developer with a strong presence in the Barcelona area, where it develops offices and unique buildings that generate wealth and business activity, and regenerates urban areas to improve urban planning and the quality of life of their inhabitants.

It acts as a driving force for business transformation towards the 4.0 economy and organizes events of economic interest for Barcelona such as the SIL logistics show or the BMP real estate show, as well as major benchmark events with an innovative format such as the Barcelona New Economy Week (BNEW) or the Barcelona Woman Acceleration Week (BWA).

## Contact

For more information about Press and Communication:

**Lluís López Yuste**

Communications Director

Phone: 609358475

[lluis.lopez@zfbarcelona.es](mailto:lluis.lopez@zfbarcelona.es)

**Berta Roig – Kreab**

Phone: 691437329

[broig@kreab.com](mailto:broig@kreab.com)

**Alba Cano – Kreab**

Phone: 635589746

[acano@kreab.com](mailto:acano@kreab.com)