

# Barcelona, logistics platform for distribution to Europe & Mediterranean/Africa

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Strategy Manager

Tokyo, 17<sup>th</sup> September 2014



**Port de Barcelona**



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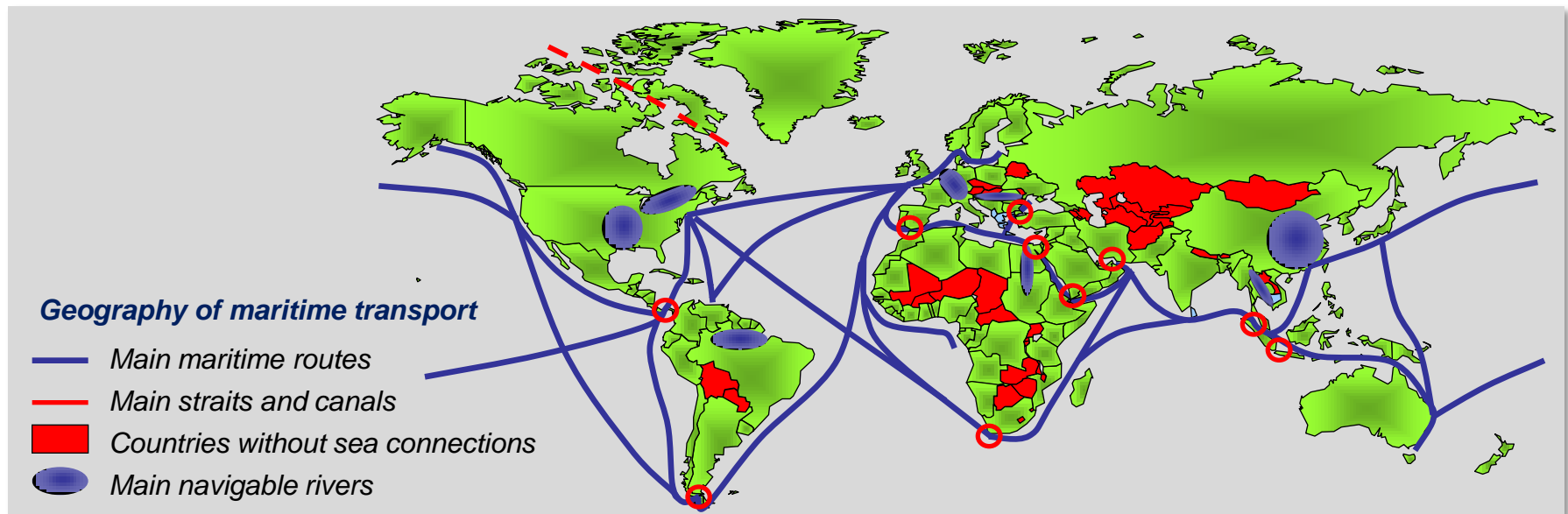
**PORT OF BARCELONA strategy in order to serve Asian and Japanese companies**



## 1. Global logistics trends and the new role of Mediterranean ports

### Main features of world logistics today

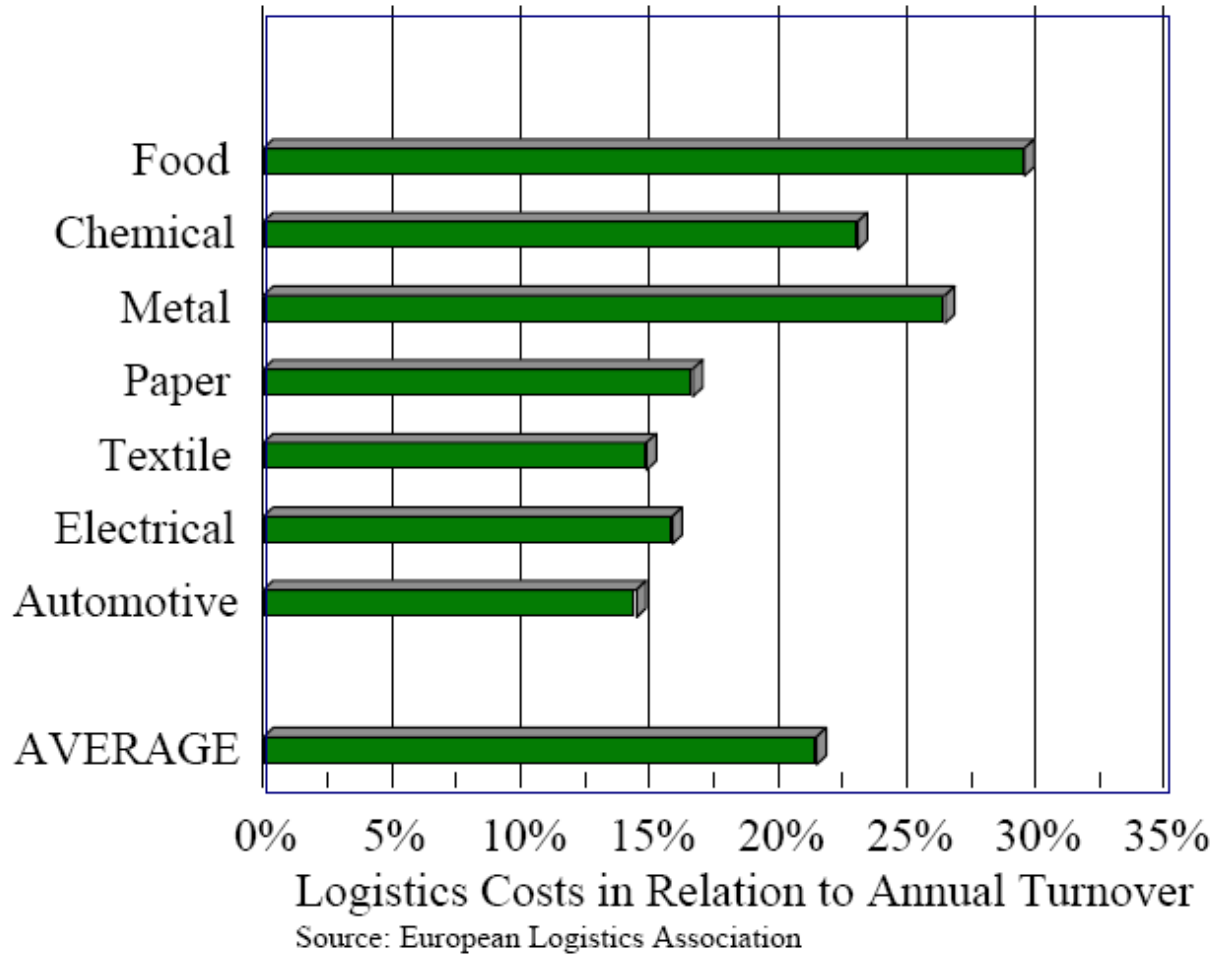
- Logistics “mega-operators”
- Change in typology and amount of Logistics costs (- inventory costs vs. + transport costs)
- Tightening of logistics schedules as companies cut inventory levels
- Lead time (Goods delivery in 24 hours)
- Inland distribution costs vs. Overseas freight
- Changes in distribution schemas (one vs. several continental distribution centres)
- Environmental restrictions (sulphur limitations in North Sea, taxes on road transportation, etc.)





1. Global logistics trends and the new role of Mediterranean ports

The impact of logistics costs on the price of products



Logistics costs include all costs of maritime transport (port passage, sea freight), land transport and inventory costs



## 1. Global logistics trends and the new role of Mediterranean ports Unstable market in the shipping business

### Freight & connectivity volatility

World Container Index's Shanghai-Rotterdam Container Freight Rate (weekly averages, \$ per 40ft container)



Note: Excludes terminal handling charges  
Source: World Container Index assessed by Drewry, www.worldcontainerindex.com

### Container Freight Rate SPOT, all-in, \$ 40 ft container

Route	Jan-14	Feb-14	Mar-14	Jan 14- Feb 14	Feb 14 - Mar 14
Asia to Europe	\$ 3,411	\$ 2,992	\$ 2,234	-12%	-25%
Europe to Asia	\$ 1,110	\$ 1,123	\$ 1,152	1%	3%

Source: Drewry Container Freight Rate Insight

Fuel price increase

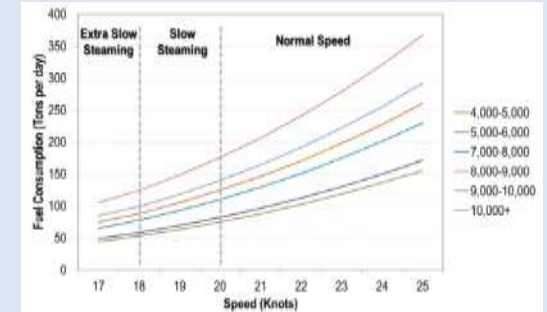
Environmental considerations

Bigger vessels

Inland transport involvement

Slow steaming

Concentration (carriers and terminals)



Notteboom and Carriou 2009

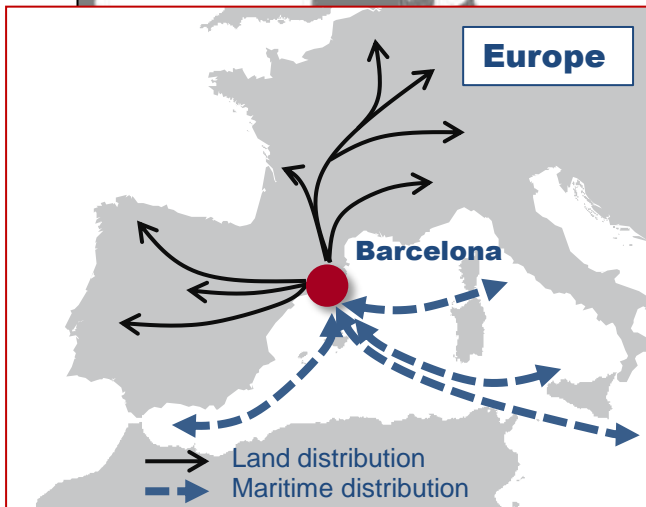


Less bunker costs, less carbon footprint, longer shipping times & more ships on service



## 1. Global logistics trends and the new role of Mediterranean ports

### The potential of Mediterranean ports on the world main trade routes



- Relevance of the Mediterranean in international trade, specially in Asia-Europe trade and in Europe-American trade
- Advantage of MED ports as distribution centers in the Mediterranean and as interlining ports for east-west routes
- Reduction of navigation days, CO<sub>2</sub>&NO<sub>x</sub> emissions. Reduction of emissions up to 15% aprox in the Far East-Europe route
- Slowsteaming: better transit time through the Mediterranean
- Less congestion than in Northern European infrastructures
- Take advantage of the Mediterranean and North and West African potential
- Reduction of logistics costs



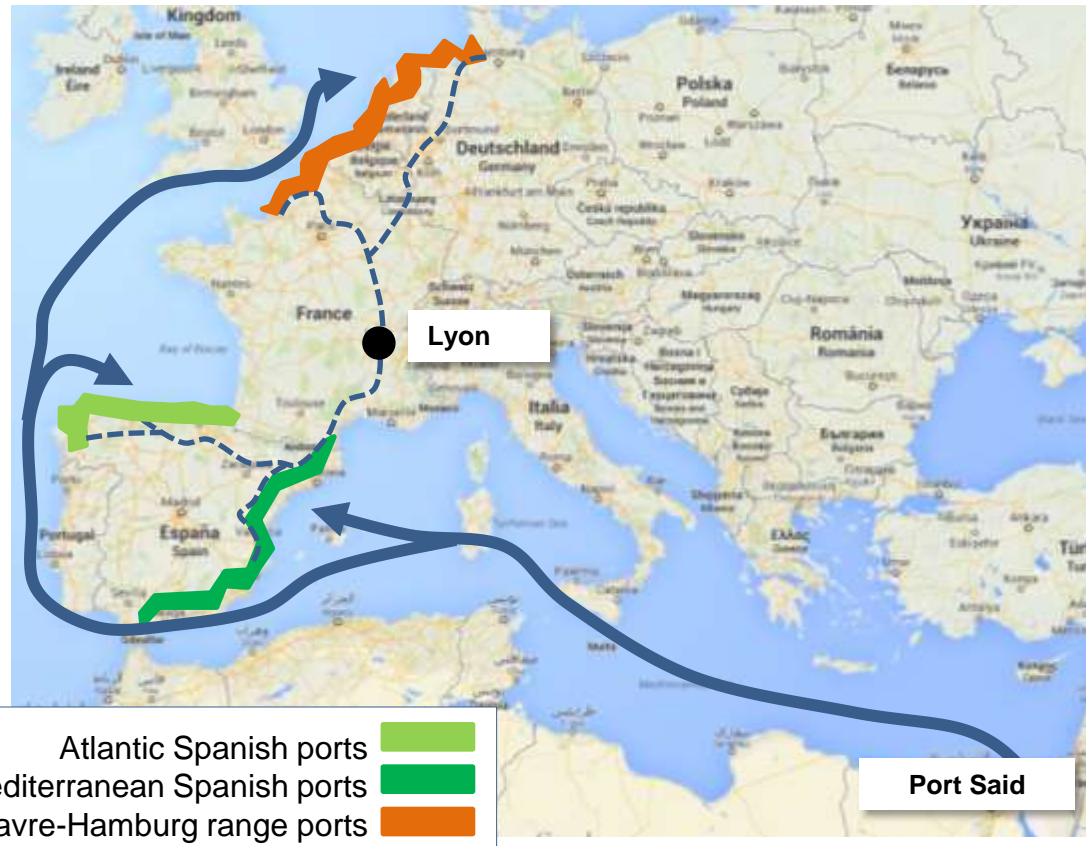
## 1. Global logistics trends and the new role of Mediterranean ports

### Environmental sustainability: CO<sub>2</sub> reduction through Spanish ports

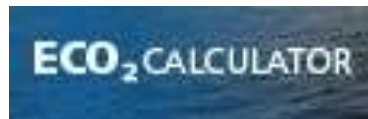
Transporting a TEU from Suez (Port Said, Egypt) to Lyon (France) via Spanish ports is more sustainable than via Northern European ports.

Average reduction of CO<sub>2</sub> emissions in comparison with the route through ports of the European Le Havre-Hamburg range. Considering rail transport between European ports and Lyon.

Via Atlantic Spanish ports	-8.7% CO <sub>2</sub>
Via MED Spanish ports	-38 % CO <sub>2</sub>



Calculations made with



The Port de Barcelona's Ecocalculator is a tool, based on European databases, for calculating the CO<sub>2</sub> emissions generated by transporting a container between Europe and the rest of the world. [www.portdebarcelona.cat](http://www.portdebarcelona.cat)



## 1. Global logistics trends and the new role of Mediterranean ports

### Some companies are already betting on the MED and BARCELONA

Manufacturers & distributors.  
Distribution to Spain, Portugal, France and MED from Barcelona.

**HONDA**  
The Power of Dreams

Schneider Electric MANGO

Dezigual®

**DECATHLON**

And 1<sup>st</sup> world terminal operator

**HPH**

**BEST**  
Barcelona Europe South Terminal

**MIGROS**  
in Genoa

**LIDL**  
in Koper

To ensure its competitiveness, the companies that have chosen Southern Europe for Euromediterranean distribution REQUIRE good connectivity – infrastructures & services - to the rest of Europe





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PORT OF BARCELONA strategy in order to serve Asian and Japanese companies



## 2. Barcelona: biggest industrial and logistics concentration in the MED and Southern Europe Industry and consumption concentration

### BARCELONA

1,5% Spanish area and 10% Spanish population, account for:

**19.8 %** Spanish GDP

**20%** Spanish industry

**30%** Spanish exporting companies

**20%** Spanish foreign trade

**25%** Spanish tourists



**Headquarters of Global Companies  
SEAT, MANGO, Desigual...**

### Global clusters

Automotive, chemical, pharmacy, fashion....

**3th city in Europe  
and 10th in the  
world as tourist  
destination**

**3rd city in the world for the  
organisation of  
international meetings and  
conferences**

**2 Business schools among the 10  
best in Europe and in the top 25  
worldwide**



## 2. Barcelona: biggest industrial and logistics concentration in the MED and Southern Europe High concentration of Japanese industries in Barcelona

75% of Japanese companies in Spain are established around Barcelona

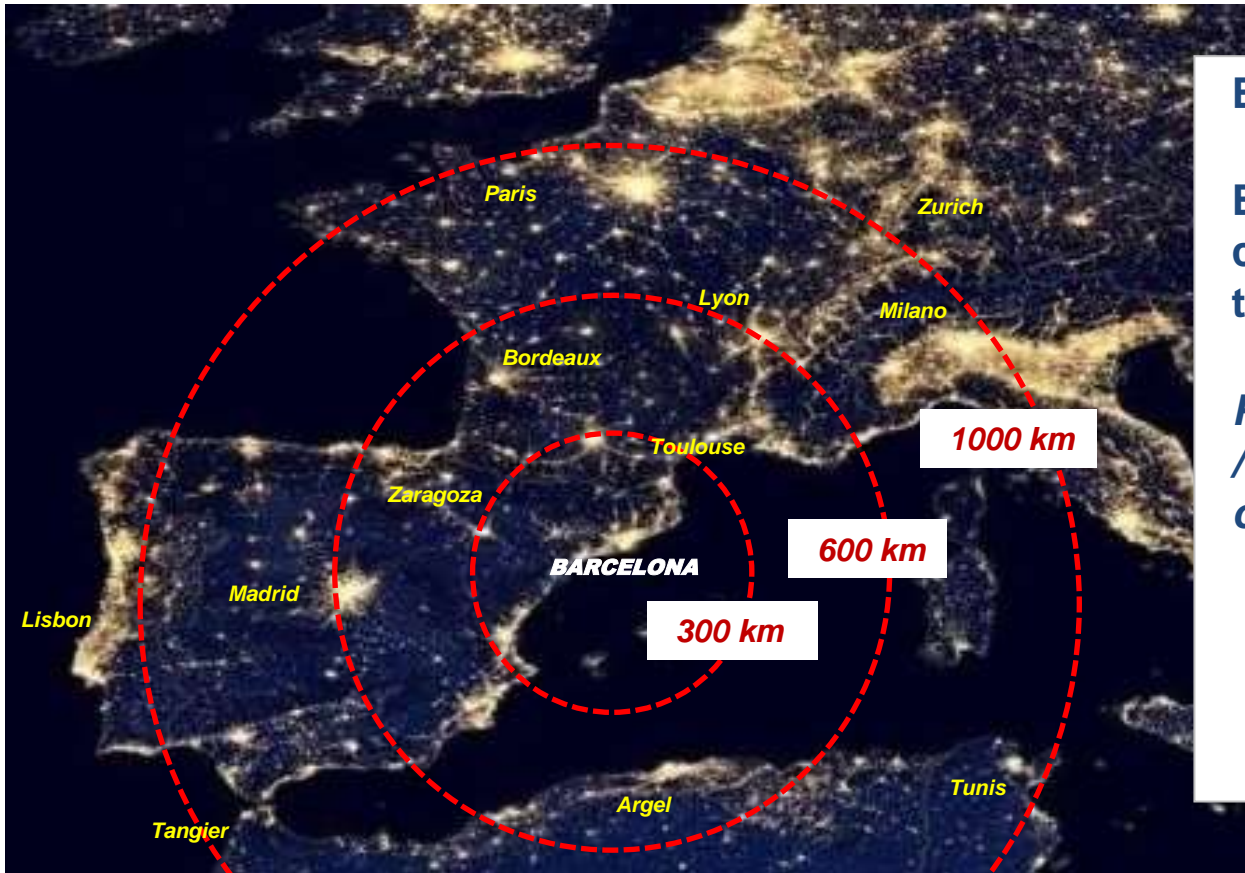
Sectors	Japanese companies in Barcelona
Electronic	14
Chemical	13
Logistics	9
Automotive	8
Agrifood	4
Metallurgical	3
Machinery	3
Others	2
Pharma / Biotech	1

57 Japanese companies are located in Barcelona

Japanese company in Barcelona by sector	Japanese company in Barcelona by sector
<b>Agrifood</b>	<b>Electronic (cont.)</b>
NISSIN R&D EUROPE SL	Fujitsu Technology Solutions
NUTRITION & SANTE IBERIA SL (NATURSOY)	KITZ CORPORATION OF EUROPE SA
ORANGINA SCHWEPPES	MURATA ELECTRONICS (NETHERLANDS) BV OFICINA DE
Tofu Catalan, SL	P3S PROYECTOS SERVICIOS SOLUCIONES Y SISTEMAS S.L.
<b>Automotive</b>	PRODUCTOS ELECTRONICOS DEL BANO ROCA
CALSONIC KANSEI SPAIN SA	SE WIRING SYSTEMS ESPANA S.L.
DENSO BARCELONA SA	SHARP ELECTRONICA ESPAÑA SA
MONTESA HONDA SA	SMC EspañaSales Office
NIDEC MOTORS & ACTUATORS SPAIN SA	SONY EUROPE LIMITED SUCURSAL EN ESPAÑA
NISSAN MOTOR IBERICA SA	TERASAKI ELECTRIC (EUROPE) LTD SUCURSAL EN ESPAÑA
YAMAHA MOTOR ESPAÑA SA	<b>Logistics</b>
YAZAKI EUROPE LIMITED SUCURSAL EN ESPANA.	AUTO TERMINAL SA
YAZAKI EUROPE LIMITED-PARIS	HITACHI TRANSPORT SYSTEM (EUROPE), B V, SUCURSAL EN
<b>Chemical</b>	HONDA LOGISTICS CENTER SPAIN SA
DOKEN EUROPE SL	J F HILLEBRAND SPAIN SA
ESTEVE TEIJIN HEALTHCARE SL	MITSUI &CO EUROPE PLC, SUCURSAL EN ESPAÑA
HEBRON SA	NIPPON EXPRESS DE ESPAÑA SA
INDUSTRIAL QUIMICA LASEM, SA	NISSIN TRANSPORTES ESPAÑA SA
KANAFLEX ESPAÑA SA	NYK LOGISTICS KAISHA IBERICA SA.
KAO CORPORATION SA	OVERSEAS Empresa COURIER SERVICE SA
KENOGARD SA	<b>Machinery</b>
MIYARISAN PHARMACEUTICAL EUROPE SL.	HITACHI AIR CONDITIONING PRODUCTS EUROPE, SA
NIFCO PRODUCTS ESPAÑA SL	TOYOTA MATERIAL HANDLING ESPAÑA SA
SAKATA Empresa INX ESPANA SA	YASKAWA IBERICA SL
SUMITOMO BAKELITE EUROPE BARCELONA SL.	<b>Metallurgical</b>
SUN CHEMICAL PIGMENTS SL	EBARA ESPAÑA BOMBAS SA
SUN CHEMICAL SA	ESTAMPACIONES METALICAS Y TRANSFORMADOS
<b>Electronic</b>	NEKI 2001 S.L.
DARUMA OPTICAL SL	<b>Others</b>
FANUC IBERIA SAU	KENKO EUROPA SA
FUJI ELECTRIC FA Europe Empresa GmbH Spain Branch	KINYOSHA Empresa IBERICA S.L.
Fujikura Automotive Europe SAU	<b>Pharma / Biotech</b>
	HOYA LENS IBERIA SA



## 2. Barcelona: biggest industrial and logistics concentration in the MED and Southern Europe Proximity to all major industry and consumption areas in Southern Europe and the Mediterranean



### BARCELONA

Biggest industrial and consumption coastal area in the MED area

*Proximity to main industrial / logistics / consumption centres in Europe:*

- 300 km** Zaragoza, Toulouse.
- 600 km** Madrid, Lyon, Alger.
- 1000 km** Lisbon, Paris, Milano, Zurich, Tangier



## 2. Barcelona: biggest industrial and logistics concentration in the MED and Southern Europe Concentration of logistics facilities & services: airport, port, logistics areas, international logistics operators....

*Important logistics international & national operators choose **ZAL Barcelona** as logistics hub and distribution center for the South of Europe and North of Africa*



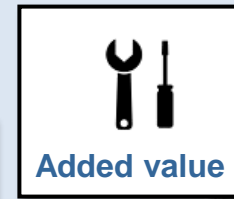
Transport,  
Logistics & Added  
Value services to  
the cargo



Transport



Logistics



Added value





## 2. Barcelona: biggest industrial and logistics concentration in the MED and Southern Europe Concentration of logistics facilities & services: airport, port, logistics areas, international logistics operators....

### Warehousing

Fullfiment  
Postponement  
Repacking  
Transformational Cross Docking  
.....

### Production services

Kitting  
Light Assembly  
Technical Services  
.....

### Distribution services

### Aftermarket services



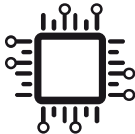
### Specialized by product segments



Fashion and footwear



Electronic products



Industrial products and consumer durables



Chemicals



Automotive





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**PORT OF BARCELONA strategy in order to serve Asian and Japanese companies**



### 3. Port of Barcelona strategy in order to serve Japanese companies

## Competitiveness and Generator of wealth

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**Barcelona is a gateway port** vs. a transshipment port: 82% M/X container traffic.

1st Spanish port,

- in terms of value of goods. Specialized in high added value merchandises, it handles cargo for a total value of 52,000 M€
- in import/export total traffic (general cargo, solid and liquid bulk, etc.). More than 34,8 Mt in 2013
- in turnover

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**1st port in new vehicles traffic** in the Mediterranean and the 4<sup>th</sup> in Europe. Relevance of export traffic thanks to the proximity of Nissan and Seat factories to the port and all other major car factories, and transshipment traffic into the North African market.

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Relevant **hub for hydrocarbons products** such as gasoline and fuel in the Mediterranean, prepared to receive larger tankers in the market.

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**1st port in cruise traffic** in Europe / Mediterranean and the 4<sup>th</sup> in the world. with 2,6 million passengers in 2013. More than 50% turn - around traffic.

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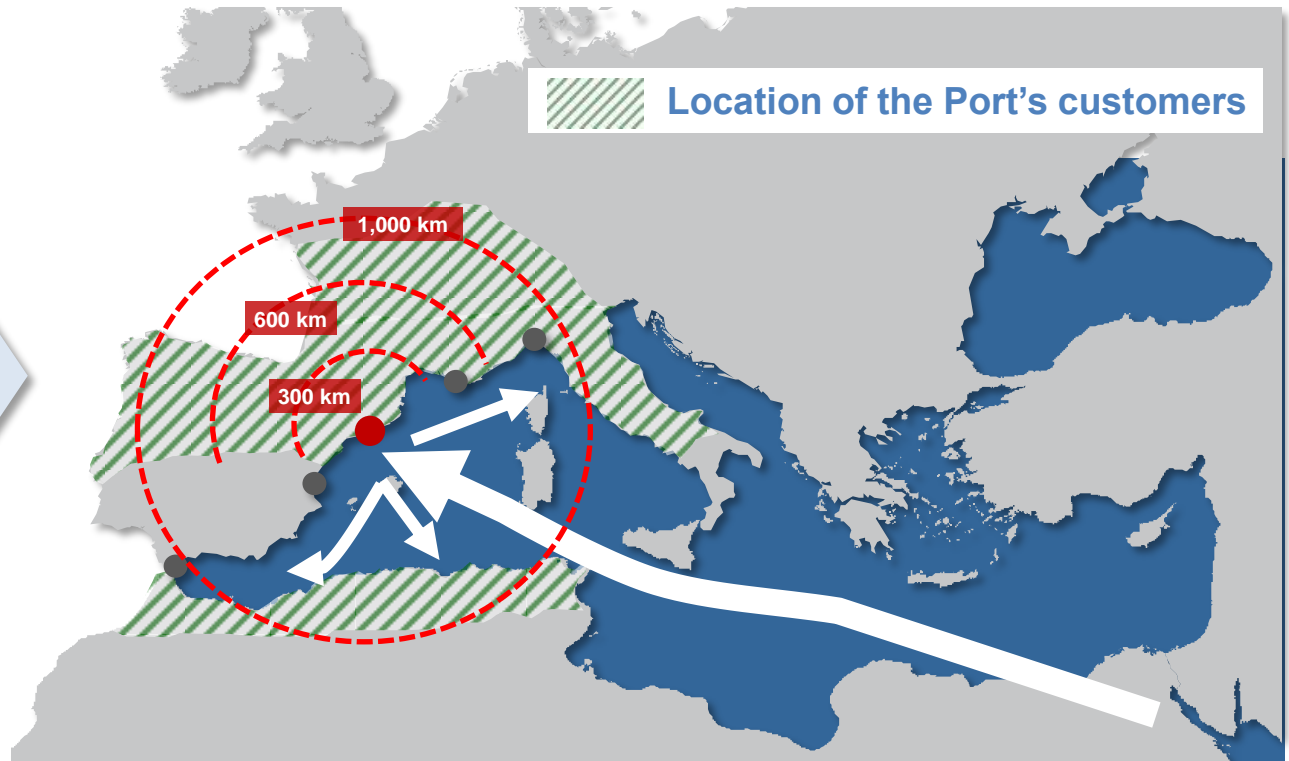




3. Port of Barcelona strategy in order to serve Japanese companies

**A logistics platform for distribution to Europe & Mediterranean/Africa**

European and Mediterranean logistics hub in order to serve our clients located in Spain, France, Italy, Portugal and North Africa



Expansion of the Port and Logistics areas



Improved connectivity with hinterland and foreland



Customer orientation: competitiveness/quality /productivity/efficiency, ...



## 3. Port of Barcelona strategy in order to serve Japanese companies Expansion of the Port and Logistics areas

Growing foreign investment by international port operators



Ongoing projects (Update March 2013)	Investment (million €)
1 New BEST terminal (Hutchison)	500
2 Marina Port Vell	35
3 Marina Nova Bocana	30
4 Tepsa: facility remodeling	14.45
5 Expansion of container terminal (TCB)	27.3
6 Improved processing plant (Bunge)	13.2
7 Iberpotash	20-30

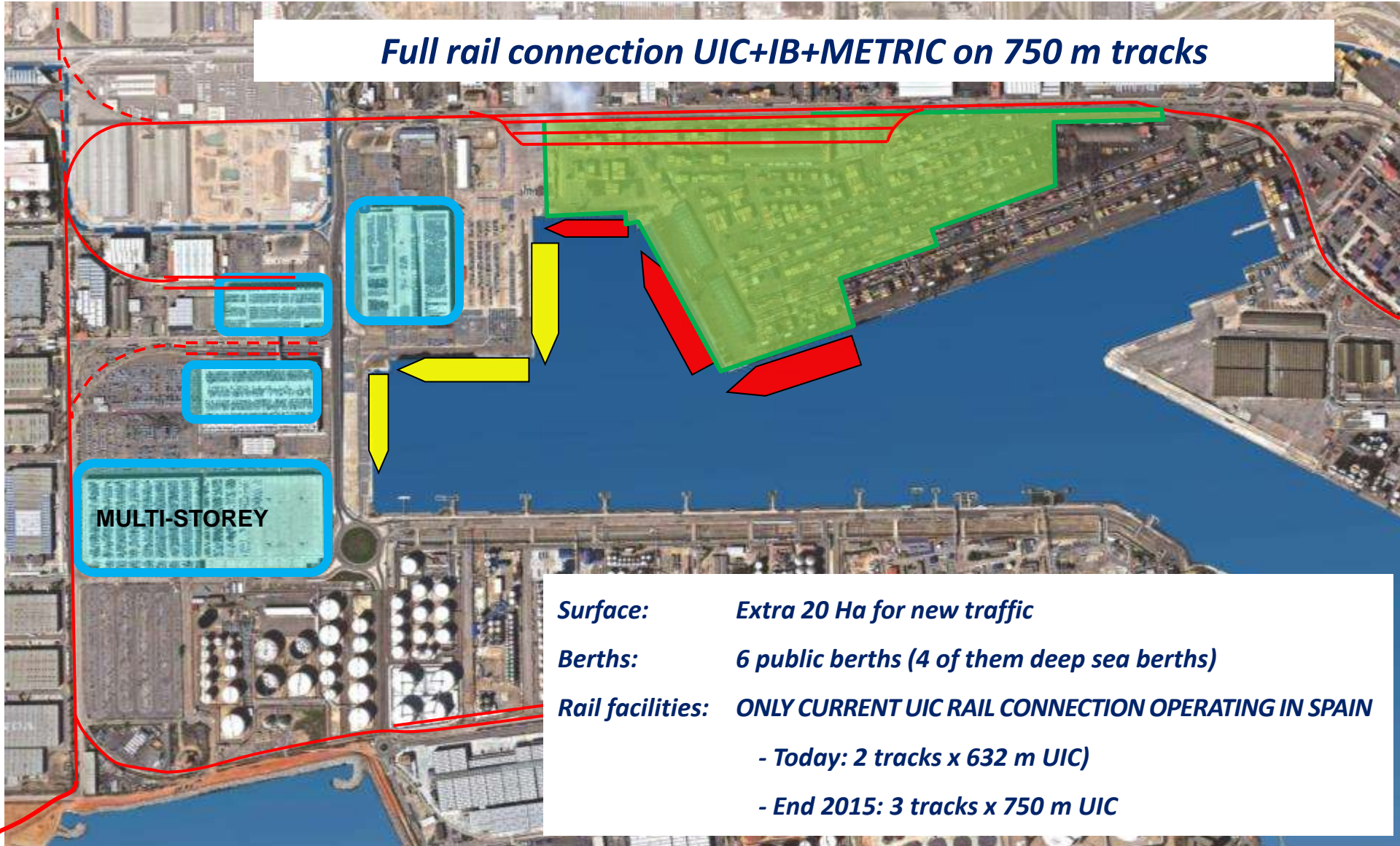
Finished projects (Update March 2013)	Investment (million €)
11 Terquimsa: capacity expansion	10.4
12 Grimaldi Terminal Barcelona	22
13 Total Petrochemicals Iberica (styrene pipe)	1.1
14 Marina Barcelona 92	13
15 Tradebe	60

**More than 2000 million € of private investment engaged 2000-2014**



### 3. Port of Barcelona strategy in order to serve Japanese companies New facilities for cars

**Full rail connection UIC+IB+METRIC on 750 m tracks**



**MULTI-STOREY**

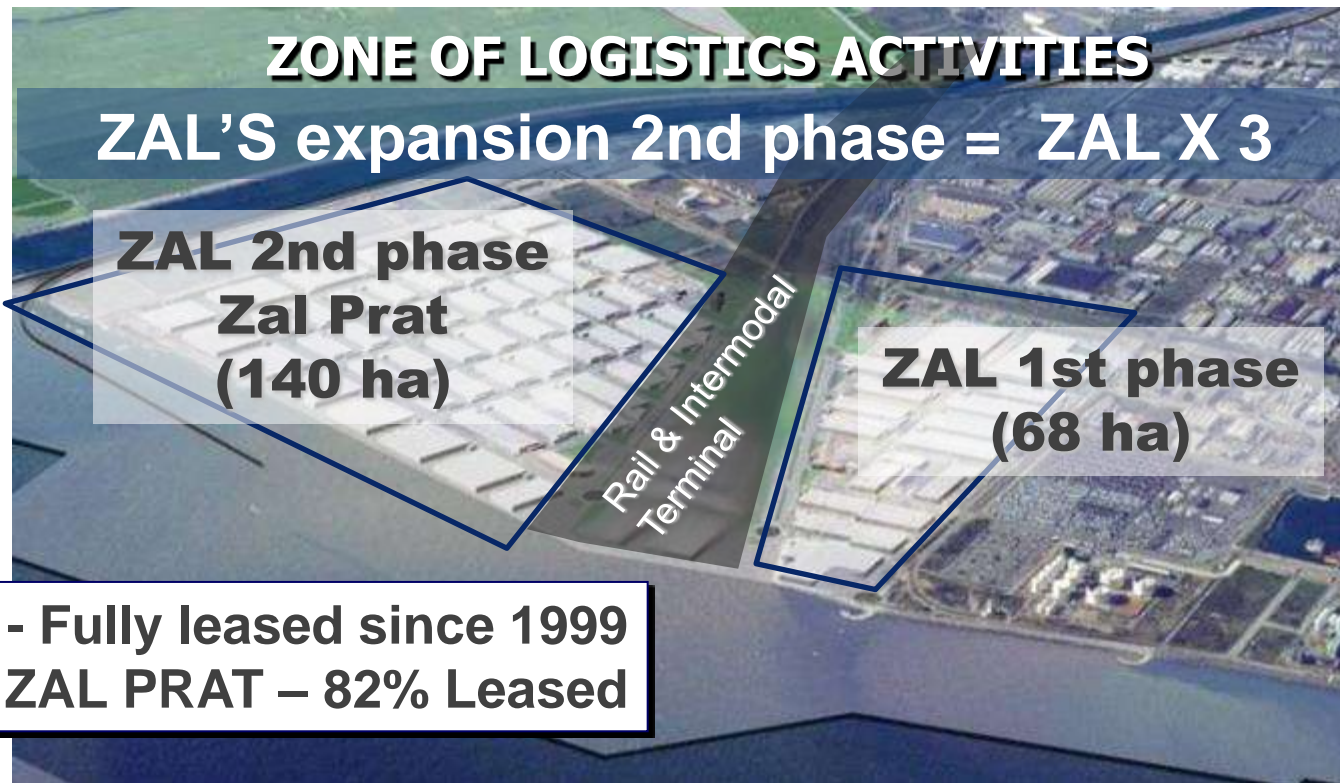
- Surface:** Extra 20 Ha for new traffic
- Berths:** 6 public berths (4 of them deep sea berths)
- Rail facilities:** ONLY CURRENT UIC RAIL CONNECTION OPERATING IN SPAIN
  - Today: 2 tracks x 632 m UIC)
  - End 2015: 3 tracks x 750 m UIC



3. Port of Barcelona strategy in order to serve Japanese companies

**Expansion of the Port and Logistics areas**

The first and biggest logistics area in the MED, today with 80% occupancy rate



- 250,000 m2 warehouses
- 45,000 m2 offices
- More than 120 companies
- 4,000 employees

**Logistic operators, freight forwarders,  
manufacturers and distributors**



## 3. Port of Barcelona strategy in order to serve Japanese companies

### Connectivity: efficient maritime connections with hinterland and foreland

#### WEEKLY CONNECTIONS WITH ALL MAIN WORLD PORTS

Regular, frequent & direct services

**HALIFAX** - 12 DAYS / **NEW YORK** - 13 DAYS / **CARTAGENA** - 13 DAYS / **SANTOS** - 15 DAYS / **BUENOS AIRES** - 18 DAYS / **ABIDJAN** - 13 DAYS / **ABU DHABI** - 22 DAYS / **NHAVA SHEVA** - 19 DAYS / **PORT KLANG** - 18 DAYS / **SINGAPORE** - 21 DAYS / **HONG KONG** - 26 DAYS



#### Maritime connections with Japan

**Cars:** 4 direct services ; TT :23 days to Shizouka - Omaezahi port  
**Containers:** 5 connections ; TT: 32 days to Nagoya port and Tokyo 33 days

More than **100** regular shipping lines  
Operated by **163** shipowners  
connecting Barcelona with **850** ports

#### NETWORK OF MARITIME SERVICES IN THE MEDITERRANEAN

##### Container liner services

N° OF WEEKLY SERVICES

Alexandria (3), Algeciras (9), Algiers (4), Ambarli (1), Annaba (1), Ashdod (2), Beirut (1), Bejaia (2), Benghazi (2), Bourgas (1), Cagliari (4), Casablanca (5), Constantza (1), Evyap (1), Fos (16), Gebze (1), Gemlik (2), Genoa (14), Gioia Tauro (6), Haifa (1), Haydarpasa (1), Iskenderun (1), Istanbul (1), Izmir (3), La Spezia (6), Lattakia (1), Limassol (2), Livorno (7), Marsaxlokk (3), Marseilles (3), Mersin (2), Misurata (1), Naples (2), Odessa (6), Oran (3), Piraeus (4), Port Said (6), Port Vendres (1), Rades (1), Salerno (3), Sfax (1), Skikda (1), Suez (3), Tangier (7), Thessaloniki (1), Tripoli (2), Tunis (2), Vado Ligure (1), Varna (1).

##### Short Sea Shipping & Ro-Ro & Multipurpose services

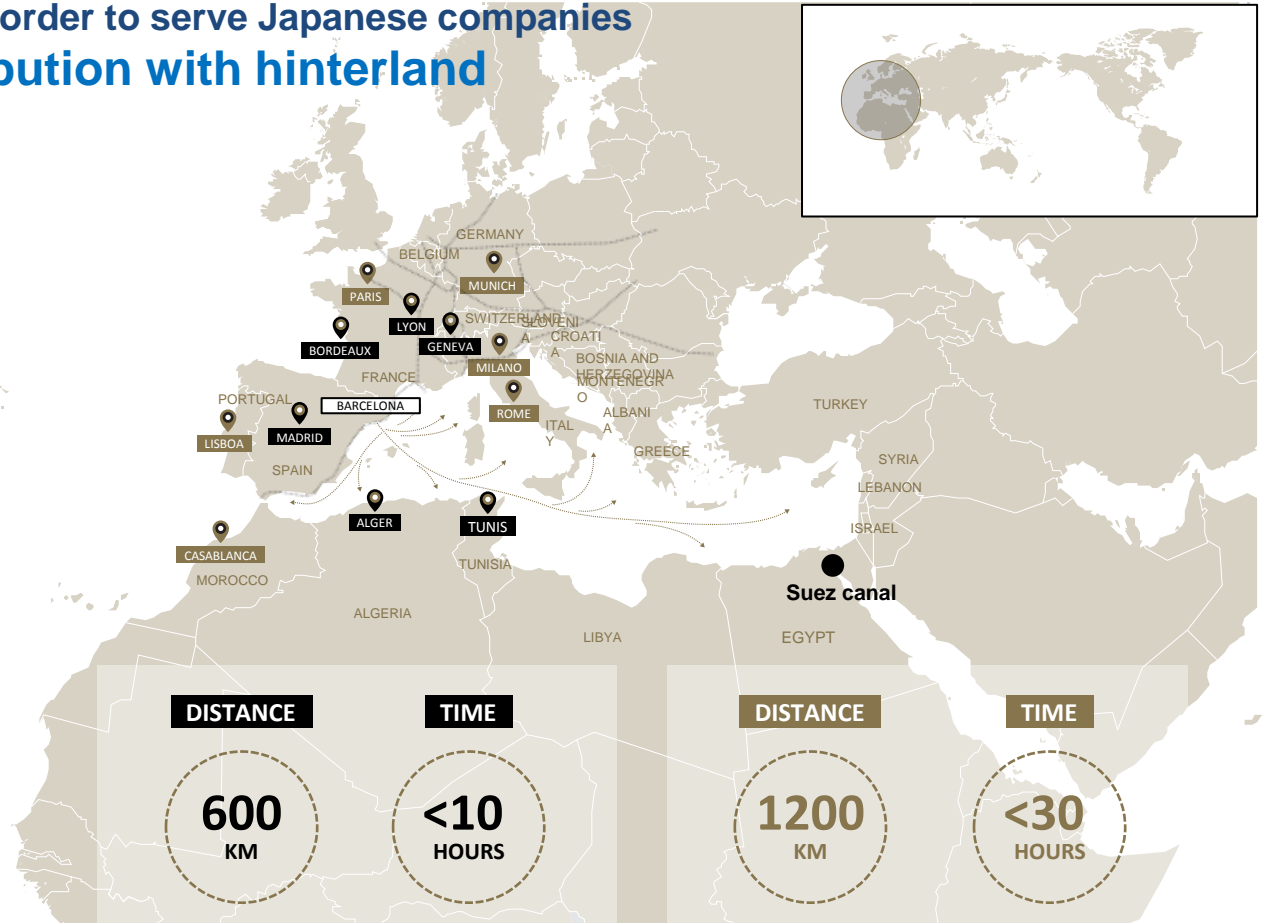
● N° OF SSS WEEKLY SERVICES   ● N° OF RO-RO & MULTIPURPOSE SERVICES





## 3. Port of Barcelona strategy in order to serve Japanese companies Connectivity: land distribution with hinterland

From Barcelona, a logistics network can reach **400 millions consumers** in less than 48 hours.



- Madrid (SPAIN)
- Bordeaux (FRANCE)
- Lyon (FRANCE)
- Geneva (SWITZERLAND)
- Alger (ALGERIA)
- Tunis (TUNISIA)

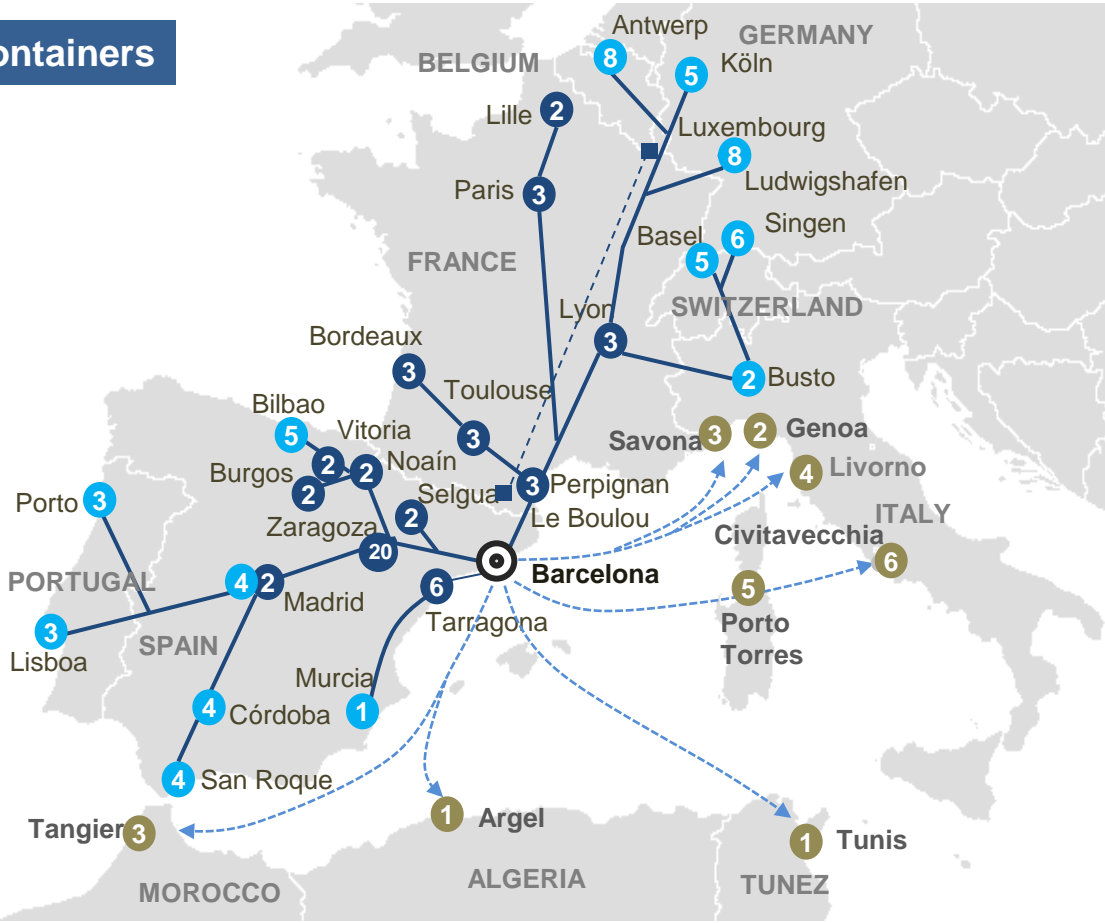
- Lisboa (PORTUGAL)
- Paris (FRANCE)
- Munich (GERMANY)
- Milano (ITALY)
- Rome (ITALY)
- Casablanca (MOROCCO)



## 3. Port of Barcelona strategy in order to serve Japanese companies

### Connectivity: efficient intermodal connections with hinterland

#### Containers



September 2014

5 Short Sea Shipping connections

#### Nº of regular rail weekly services

In each direction

- Origin / Destination Port terminals  
TCB and BEST
- Origin / Destination Port continental terminals  
Morrot, Can Tunis or Granollers
- Rail Motorway  
Le Boulou-Luxembourg

#### Evolution of rail market share

Year	TEU Hinterland	TEU Rail	%
2008	1,610,252	52,562	<b>3.26</b>
2009	1,193,978	59,554	<b>4.99</b>
2010	1,308,283	103,898	<b>7.94</b>
2011	1,367,031	146,685	<b>10.73</b>
2012	1,315,505	148,926	<b>11.32</b>
2013	1,443,399	154,522	<b>10.71</b>
2014*	879,017	95,522	<b>10.87</b>

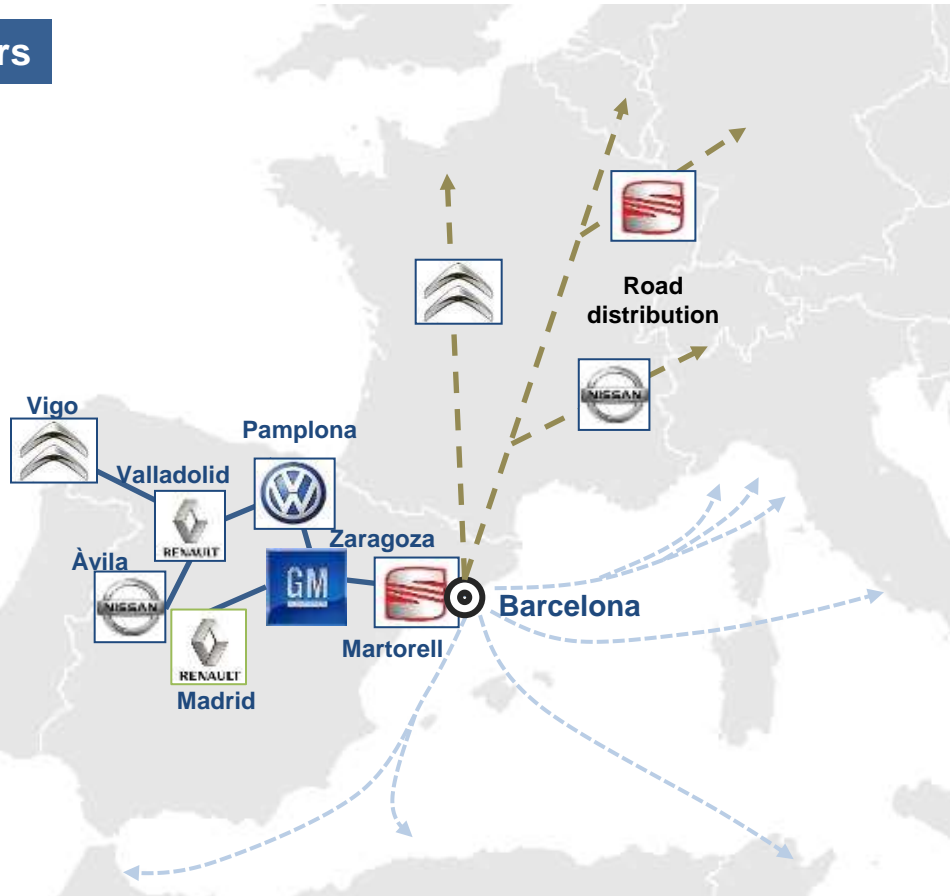
\* January-July



## 3. Port of Barcelona strategy in order to serve Japanese companies

### Connectivity: efficient intermodal connections with hinterland

#### Cars



	Hinterland traffic of cars	Cars by rail	Rail market share	SEAT service	Rets of services
2013	568,913	175,362	30.82%	104.206	71.156
2014*	88,636	33,491	37.78%	18.622	14.869

\* January-February

#### REGULAR rail services

Shipper	Spanish origin	Nº of weekly services
	Martorell	15
	Àvila	1
	Pamplona	3-5
	Valladolid	3-5

#### SPOT trains with destination Spanish Islands and Italy

Shipper	Spanish origin
	Zaragoza
	Navarra
	Vigo
	Valladolid

#### IMPORT train



**To MADRID**  
5 trains in 2014





## 3. Port of Barcelona strategy in order to serve Japanese companies

### Customer orientation: competitiveness/quality /productivity/efficiency...

#### Container terminals productivity

- Barcelona, highest productivity of the MED
- Catch up of shipping delays
- Berthing windows & flexibility
- BEST terminal case:  
220 moves/hour  
average annual crane productivity: 38 moves/hour

**10th position in the ranking of container ports productivity in Europe, Middle East and Africa in 2013 and with the largest increase over the previous year** (productivity per berth; container movements per hour)

Source: The journal of Commerce. Elaboration: Transporte XXI

#### Efficiency network



**Efficiency network** is the quality brand of the Port of Barcelona. Adherent companies to the brand assume the quality commitments in the service through a set of defined indicators.

#### Competitive prices

**Contribution to the competitiveness** of operators, shipowners , shipping lines...

- Discounts port concessions
- Rebates port policy: Berthing dues (Spanish T1) & Wharfage dues (T3 in Spain)



## 3. Port of Barcelona strategy in order to serve Japanese companies

### Customer orientation: competitiveness/quality /productivity/efficiency...



The SAC (Customer Service) is the link between the market and the Port. It acts as a promotion, complaints handling, information requests, incidents resolution, etc.



Portic is the Port Community System of the Port of Barcelona. Improves the competitiveness of the port community through a technological platform that provides an easier interaction



The Quality Team (EQ) is involved in the detection of damage and faults in the goods and in the seal and supports the inspection services; Controls interventions and provides incidents information. It acts at TCB, Tercat, the PIF, and Setram Autoterminal.



The APB has begun to develop logistics consultancy work for those customers that want to improve their logistics, proposing more competitive alternatives than usual.



Information services addressed to end users. Recently, training actions have been initiated in company to exporters and importers.



Information service regarding the CO2 generated by the customer logistics chains and advice on more effective alternatives from an environmental point of view.



[www.portdebarcelona.cat](http://www.portdebarcelona.cat)

**Thank you**

