

SILBARCELONA

expo & congress

26-28 June 2019

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PRESS DOSSIER

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

26 -28 June 2019

Hall 8, Montjuic-Plaza España Venue, Fira de Barcelona

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ZONA FRANCA

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SIL 2019 TECHNICAL DATA

Name:	Leading Exhibition for Logistics, Transport, Intralogistics and Supply Chain in Southern Europe
Organizers:	Consorti ZF Internacional, S.A.U.
Venue:	Montjuic-Plaza España de Fira de Barcelona. Hall 8 Avda. Reina Maria Cristina s/n 08004 Barcelona
Character:	Professional
Scope:	Internacional
Frequency:	Anual
Edition:	21st
Dates:	26 - 28 June 2019
Exhibitors opening hours:	From 8 a.m. to 8 p.m.
Visitors opening hours:	26 - 27 June from 9 a.m. to 7 p.m. and 28 June from 9 a.m. to 6 p.m.
Participating companies:	650 (40 % international)
2019 News:	World Free Zones Congress, InTrade Summit BCN; Aragon Guest Autonomous Community, SIL Talks.

Sectors:

- Transportation and logistics systems, infrastructure and real estate.
- Storage, equipment and maintenance.
- Telematics, e-business, telecommunications, IT solutions to put the world in motion.

SIL 2019 News

SIL 2019, the Leading Exhibition for Logistics, Transport, Intralogistics and Supply Chain in Southern Europe will celebrate this year its 21st edition. SIL was born as a Symposium 22 years ago, in 1998, and the first edition of the exhibition took place one year later. An exhibition that has developed year after year hand in hand with the industry and that has been loyal to its annual meeting without a break until today. In this very special edition, SIL presents as outstanding points and main novelties:

Aragon, Guest Autonomous Community

Aragón will be the SIL 2019 Guest Autonomous Community. The Community will have a very prominent participation at the Leading Exhibition for Logistics, Transport, Intralogistics and Supply Chain in Southern Europe with a 300 square meters' stand, where it will showcase all its global supply and logistics potential in order to promote and publicize the possibilities offered by Aragon to attract new investors and companies that are established and grow within the territory

Logistics is a strategic sector for the Aragonese economy. The Logistics Platform of Zaragoza (Plaza), Huesca (Plhus), Teruel (Platea) and Fraga offer different options depending on the needs of each company and the different required standards, presenting a wide and flexible range of functionalities. As for the connections of the Aragonese platforms, the effective connectivity by land, sea and air of Zaragoza with the rest of Spain and Europe must be highlighted. The Plaza facilities include an airport at zero-kilometer, that has become today the second cargo one in the country. The intermodal terminals (Plaza, TmZ and TIM) connect with the main Spanish ports on a daily basis and link, in addition, with the main Spanish land connection routes. The Cantabrian Mediterranean Corridor, next to the Ebro Corridor, finds in this Community the necessary, logical and profitable link to boost the traffic of the biggest European connection commitment.

The quality of the platforms, on the other hand, is widely supported by the presence of the main operators and international companies, up to almost 500 companies, among which **Inditex**, which has made Zaragoza a reference in its distribution, stands out, together with **B / S / H**, **Decathlon**, **Mercadona**, **Pikolín**, **Grupo Carreras**, **Grupo Sesé**, and so on and so forth.

The talent and a wide range of specialized staff in the Community find, in Aragon, a center of reference in the Zaragoza Logistics Center (ZLC) and in the University, which has its own APL Chair for the promotion of new professionals. The Technological Institute of Aragon (ITA), also, is one of the spearheads in terms of research in the logistics sector's blockchain and big data. This circle is closed with public work in the internationalization of companies in the sector and the attraction of investments, driven by the Government of Aragon through the Aragon Exterior public company.

The participation of private companies in **Aragón Plataforma Logística** -pictured, mainly, through the work of the Cluster of Logistics- and the set of public institutions of the three provinces in this initiative have made logistics a commitment, as its motto says, of the entire Community. The results have been enlightening: in three years the Aragonese platforms have managed to market more than 800,000 square meters of logistics land only in public projects, a guarantee presented by the regional government through its Department of Economy, Industry and Employment. Its counselor **Marta Gastón** presides over the company in close collaboration with the rest of the Departments due to the President of Aragon's commitment to logistics as a strategic sector of the Community.

World Congress of Free Zones

The Congress Center at Fira de Barcelona will host the 5th World Free Zones Summit that will gather in the City of Barcelona more than a thousand free zone representatives from all over the world. The previous editions of the World Free Zones Congresses were held in **Dubai** (2015, 2016 and 2018) and **Cartagena de Indias** (2017), so it will be the first time ever that it will take place in Europe.

The **5th edition of the World Free Zones Congress**, which will be held in parallel with SIL 2019, will gather in the same event prominent discussion panels, presentations, networking activities, workshops and an exhibition area, putting the focus of interest on the proposal to adapt free zones to become the pillar of productions that boost technological transformation and digitalization of processes according to the 4.0.economy requirements

The coming edition of the World Free Zones Congress wants to strengthen the relationship with international players to deal jointly with the main issues of the logistics

sector agenda, such as electronic commerce, mobility, the role of free zones, 3D printing, 4.0 industry and the UN Sustainable Development Goals (SDG).

In addition, the World FZO will present the results of one of its latest initiatives, the Izdihar Index, an index that analyzes the impact of free zones on the citizens' "prosperity". This index looks for the indicators that analyze how the growth that the free zones enhance ends up becoming prosperity for the territory.

It should be noted that the Barcelona candidacy, represented by the Consorci de la Zona Franca de Barcelona, was elected in its day over proposals from **Egypt, Kazakhstan, Mexico and Serbia.**

The **WFZO**, which has its global headquarters in **Dubai**, gathers a total of 552 free zones in 115 different countries. According to this organization, in the world there are some 3,500 free zones in 130 countries, which represent more than 70 million workplaces, which is equivalent to approximately 1% of the registered world workforce

InTrade Summit BCN

In parallel to the SIL and eDelivery Barcelona 2019 will take place the InTrade Summit BCN, that will gather in Barcelona more than 3,400 congressmen and 315 speakers from more than 30 countries, will deliver more than 100 sessions and will present more than 50 international trade and logistics successful cases. The InTrade Summit BCN, with the collaboration of AZFA -the Association of Free Trade Zones of the Americas-, encompasses the following international events:

-XXXVI ALACAT Congress: The largest congress of cargo agents and logistics operators in Latin America.

-International Congress of Authorized Economic, Customs and Logistics Operators: It will provide a unique opportunity to establish networking with the public and private leaders of the customs and international logistics community

-MedaLogistics Summit: It is the main meeting point that focuses its interest on transport and logistics as economic pillars and factors for the integration and development of trade in the Mediterranean area. Within this important event also takes place the Mediterranean Ports Summit.

A) XXXVI Congreso ALACAT

La XXXVI edición del Congreso de ALACAT, la Federación de Asociaciones Nacionales de Agentes de Carga y Operadores Logísticos Internacionales de América Latina y el Caribe se celebrará del 26 al 28 de junio dentro del SIL 2019. Será la segunda vez que este importante congreso se celebrará junto al SIL con el objetivo de aprovechar la ocasión para reforzar los lazos de Latinoamérica con Europa, en un congreso en que se tratarán temas como la logística 4.0, la digitalización y las tendencias de comercio exterior.

This edition of the ALACAT Congress will focus on e-commerce, a challenge but also an opportunity. We have to be prepared and think about how to link the new e-commerce services. The logistics business is the fastest growing one in the world, which indicates that we are in the right business. Likewise, automation and digitalization will also be important topics that the ALACAT Congress will address.

B) OEA International Congress

The International Congress of Authorized Economic Operators (OAS) will gather from June 26 to 28 in Barcelona the entire customs sector together in a space where the present and future of the sector will be analyzed and discussed, showing initiatives to help us improve trade and make ourselves much more competitive.

It will be a great opportunity to establish a global networking with the public and private leaders of the customs and international logistics community. At the same time, it will be the ideal meeting point to address the current challenges of the sector, placing a special emphasis on security, an aspect where the Authorized Economic Operators play a fundamental role.

C) MedaLogistics Summit

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 Chamber of Commerce of Barcelona, the MedaLogistics Summit will celebrate its 17th edition on the 26th and 27th of June. The MedaLogistics Summit will host the 17th edition of the Meda Logistics & Transport Forum and the 12th edition of the Meda Ports & Shipping Summit, as well as business meetings. This new annual edition, which has consolidated itself as the international reference of the Mediterranean, will bring together

hundreds of entrepreneurs, investors, government representatives, industry associations, multilateral organizations and senior public and private sector logistics and transport in the Mediterranean, Europe, Africa and Asia.

Barcelona will return one more year to depict the Mediterranean spirit for 2 days, with the annual appointment of the platform with the greatest affluence and Mediterranean influence. The celebration of the 17th edition of the 2019 Mediterranean Logistics, Transport and Ports Summit represents, to a certain extent, the triumph of bringing people together and fostering ideas of development, building bridges, connecting people and businesses. Barcelona, due to its geographical and strategic location, as well as its capabilities and infrastructures, is consolidating itself as the benchmark for the Mediterranean logistics and transport sector. The commitment to infrastructures must remain a priority, especially for the Mediterranean Corridor and the creation of more efficient networks and logistics services.

World trade is shifting and the model, which has seen for centuries how the Western maritime powers controlled cargo flows, is giving way to a more multidirectional and multimodal future. China is trying to exert a greater influence on the new dynamics of world trade, particularly through the New Silk Road, a multi-billion dollar initiative that aims to form a new intercontinental trade through a new network of maritime and land connections between Asia, Europe and Africa, based on old trade routes. Maritime transport is a fundamental pillar of the world economy. 80% of the goods and around 50% of the oil circulate by sea, and the Mediterranean has the key.

Digitalization, sustainability and security, key points of the SIL Congress

Under the title "**Supply Chain and 4.0 Industry: the new era of digitalization and sustainability**" the SIL Congress will gather more than 220 international speakers over 16 sessions. On Wednesday, June 26th, the congress will focus on digitization and integrated supply chains, on Thursday 27th it will focus on transport and sustainability, and on Friday the 28th it will focus on transport and security.

The SIL Congress will deliver more than 100 success stories from leading companies such as **Nestlé, Desigual, Boehringer Ingelheim, Pepsico España, SEAT, Mahou San Miguel, Eninter, Bodegas Torres, Grifols, Nissan, Vichy Catalán, Bidafarma,**

CELSA Group, Calidad Pascual, Hospital Virgen del Rocío o Alastria. The price of the SIL Congress will be 295 euros for two days or 150 euros for those attending just one day. SIL also offers its visitors a Platinum Pass that has an amount of € 650 and allows them to attend the SIL Congress, the eDelivery Barcelona Congress, the ALACAT Congress, the OEA International Congress and the Logistics and Transport MedaForum. At the same time, all these congresses can be followed in streaming through the SIL 2019 App.

Another new SIL 2019 feature will be the creation of the SIL Talks, two spaces that will host 20-minute conferences, located in the exhibition area dedicated to intralogistics and transport and infrastructures.

SIL 2019 will increase its commitment to networking

Another of the SIL 2019 novelties is its firm commitment to networking. In addition to the celebration of the Logistic Circle, which puts the participating companies in contact with the main directors of logistics and industrial Supply Chain, the fair will also hold an **International Networking Lunch**, where participating companies can contact more than 600 decision-makers from the sector coming from Europe, Latin America and the Mediterranean. In addition, all the SIL participating companies may contact with all the attendees and speakers of the different conferences that will be held in parallel with SIL through a system of instant messaging in the fair's App.

eDelivery Barcelona, the latest in innovation

eDelivery Barcelona 2019, the eCommerce Delivery, Logistics and Last Mile International Exhibition will bring together more than 50 participating companies and 60 international speakers who will discuss the challenges posed by delivery and logistics as critical aspects of any digital business. eDelivery Barcelona 2019 is committed to innovation with the Startup Innovation Hub, an exhibition area dedicated to small businesses that are betting on innovation and developing new disruptive concepts that are solving the challenges posed by the distribution sector and the last mile.

The 10 best participating startups will have the opportunity to access the eDelivery Accelerator, an acceleration program promoted by the Consorci de Zona Franca de Barcelona and organized by La Salle Technova Barcelona. The Acceleration program includes training sessions in different areas, workshops with companies in the ecosystem and work spaces, and will be exclusive for the startups participating in the eDelivery

Start-up Innovation Hub. The 5 finalist startups that will have an option to participate in the Best Start-up award in the sector are: **Original Repack, Stockagile, Mayordomo, Paymark Fast y Truck Parking Europe.**

The SIL's keypoints

SIL reaches its 21st edition consolidating itself as the annual logistics meeting in Spain and the Mediterranean thanks to the interconnection of 4 lines of action that have been present since the first edition:

- To be the logistics sector meeting point

- International Projection: Year after year, SIL attracts more international exhibitors and visitors, becoming a bridge connecting the European and the Latin American markets with that of North Africa, the Middle East and the Mediterranean basin, especially the Maghreb area and with that of Southeast Asia.

- To be the true forum of logistical knowledge, a qualified and privileged place for reflection. Therefore, it promotes an outstanding agenda of conferences that take place throughout the days of the fair.

- To be committed to the new technologies as a strategic factor in the logistics sector and bringing the latest innovations and trends in the sector closer.

10TH CÍRCULO LOGÍSTICO BAROMETER 2019

A 42.2% of the Spanish industry will make significant investments to adapt itself to the 4.0economy

The twenty-first edition of the leading Exhibition on Logistics, Transport, Intralogistics & Supply Chain in Southern Europe, SIL 2019, has carried out the X Círculo Logístico Barometer that has analyzed in depth the logistics' industry. 1,077 Spanish directors of Logistics & Supply Chain from different industry sectors have participated as members of the SIL 2019 Círculo Logístico. The profile of the sector of activity of the different directors or heads of Logistics or Supply Chain that have participated in this X Círculo Logístico Barometer is the following:

What is your sector of activity?	
FOOD AND GREAT DISTRIBUTION	27.3%
CHEMICAL, PHARMACEUTICAL AND HEALTH	27.4%
TEXTILE/RETAIL	5.4%
TECHNOLOGY AND ELECTRONICS	7.1%
MACHINERY AND IRON AND STEEL INDUSTRY	8.3%
CAR INDUSTRY	10.1%
CONSTRUCTION & REAL ESTATE	7.1%
PARFUMS & COSMETICS	4.6%
OTHERS (HARDWARE, PAPER AND ADVERTISING DEVICES...)	2.7%

A good logistics director must be an analytical person

22.5% of the directors of Logistics or Supply Chain that have participated in the current edition of the Barometer of the Círculo Logístico considers that the main attribute that a good logistics director must have is that of **being analytical**. This aspect is striking because this attribute was the fourth most valued in the Barometer of 2017 and the second in last year's one.

In the second place we find the fact of **being innovative** (21.8%), an attribute that in 2018 occupied the first place with 32.9%.

The **bargaining skills** (16.3%) or the fact of **having empathy** (11.2%) are also very important in order to be a 'good logistics manager'. The 2019 Círculo Logístico

Barometer mentions for the first time the attribute of **having a good education** (9.1%) as important.

The 1,077 Logistics or Supply Chain directors that have participated in the 10th Círculo Logístico Barometer also consider it important that a 'good logistics' person has a **digital mentality** (7.3%) and has **contacts** (7.1%).

What is the main quality that a 'good logistics director should have?			
	2019	2018	2017
BEING INNOVATIVE	21.8%	32.9%	36.8%
BEING ANALYTICAL	22.5%	27.7%	11.8%
BARGAINING SKILLS	16.3%	18.1%	23.2%
HAVING EMPATHY	11.2%	11.5%	21.9%
HAVING A GOOD EDUCATION	9.1%	0%	0%
HAVING PATIENCE	3.5%	8.2%	6.3%
HAVING A DIGITAL MENTALITY	7.3%	9.8%	0%
HAVING CONTACTS	7.1%	0%	0%
OTHERS	1.2%	1.6%	0%

A 26.7% of the logistics managers consider that their figure should be better valued by the company's managing director

Despite the weight that logistics has in the success of any company, only 46.8% of the managing directors consider that the figure of the Director of Logistics is well valued in their organization. It should be remembered that this figure last year was 49.9% and in 2017 65.3%, and thus the number of logistics managers who think that their figure is not sufficiently valued by the company has grown.

A 21.8% of the respondents believe that the Managing Directors of the company where they work consider the figure of the Logistics Director as **essential**. This fact is rather worrying if we compare it with the results obtained in the last two years' Barometer, since it has diminished a 28.5%. At the same time, a 28.5% of the Managing Directors consider that the figure of their company's Logistics Director as **quite important**, a 25.3% say that it is **fairly valued**, a 26.7% consider that it **should be more valued** -a number that has increased a 3.4% with respect to last year- and a 1.2% consider that **it isn't valued at all**, a number that has increased a 0.8% with respect to last year

Is the Director of Logistics well-regarded by the General Directorate of companies?			
	2019	2018	2017
YES, IT IS FUNDAMENTAL	19.1%	21.8%	47.6%
YES, IT IS VERY IMPORTANT	27.7%	28.1%	17.7%
RIGHT ON	25.3%	26.3%	16.1%
NO, IT SHOULD BE MORE VALUED	26.7%	23.5%	18.6%
NOT AT ALL	1.2%	0.4%	0%

Transport, the main outsourced logistics activity

The most outsourced logistics activity, as has already been the case in the previous Circulo Logístico Barometer, is, without a doubt, **transport**. 95.7% of the 1,077 Logistics or Supply Chain directors that have participated in the SIL 2019 Circulo Logístico Barometer affirms that they subcontract the transport services of their company. This figure, although it is slightly lower than last year (-0.7%), places transport as the undisputed leader in this category, since it is located at a great distance from the second most outsourced activity, which is **distribution** with 58%. It should be noted that the distribution has increased a bit compared to last year (+ 2.6%) and considerably compared to two years ago when it grew a 13.7%. The increase in distribution as a logistics activity subcontracted by Spanish companies can be said to be practically a constant since the beginning of the Circulo Logístico Barometer in 2010.

Another logistics activity that experiences a strong growth at the time of subcontracting is the **material handling** and **stock management** with 26.1%. This activity grew by 6.4% compared to last year and 12.1% compared to the 2017 Barometer. Still, it should be noted that the third activity, service or product most outsourced in the logistics sector is packing and packaging in a 27.6% of the cases.

Another fact that stands out from the 10th SIL 2019 Círculo Logístico Barometer is that the logistics services outsourced by Spanish industrial companies have increased. This figure has increased a 16.4% with respect to last year and a 42.1% with respect to 2017.

What logistic activities do you usually subcontract?	2019	2018	2017	2016	2015	2014	2013	2012	2011	2010
TRANSPORT	95.7%	96.4%	91.2%	96.6%	92.4%	95.8%	91%	88.1%	87.3%	92.7%
DISTRIBUTION	58%	55.4%	44.3%	46.8%	47.7%	43.5%	50.5%	39%	44.9%	41.2%
PACKING AND PACKAGING	27.6%	26.9%	21.9%	24.9%	21.4%	20.5%	16.5%	16.3%	14.6%	22.4%
MATERIAL HANDLING & STOCKS MANAGEMENT	26.1%	19.7%	14%	26.2%	25.2%	17%	21%	10.7%	18.1%	12.2%
SYSTEMS AUTOMATIZATION	16.6%	17.6%	14%	15.4%	16%	15.5%	11.5%	10.1%	11.7%	12.6%
PRODUCTION	10.4%	9.8%	9.6%	14.6%	10.3%	8%	10%	6.9%	4.9%	5.6%
PURCHASES	10.1%	3.6%	6.6%	11.6%	8.8%	2.8%	2%	3.1%	5.8%	4.3%
OTHERS	2.3%	1%	3.1%	3%	0%	0.5%	2%	1.2%	2.4%	1.3%

Quality stands out as the most important aspect to outsource

Quality is still the aspect most valued by the Logistics or Supply Chain directors of the Spanish industrial companies when it comes to outsourcing a logistics service, and this year it stands out in a special with an 85.2%. This figure is 6.6% higher than last year's and confirms the upward trend that has been experienced in the 10 editions of the SIL Círculo Logístico Barometer.

The second most valued aspect is **flexibility** with 62.8%, a very remarkable aspect because in just one year it practically doubles this figure, which in 2018 was 32.3% (+ 30.5%). The **saving** the company will experience when subcontracting a certain logistics service or product is in the third place with 58.1% and also gains importance with respect to last year (+ 3.4%) and 2017 (+7 , 7%).

On the other hand, the supplier's **experience and the confidence** that it inspires when subcontracting (50.1%) stands in the fourth place, with a 4.1% decrease. It is followed by **specialization** (34.2%), **speed** (27.6%), **business optimization** (14.7%) and **HR** (9.9%).

What aspects do you value most when subcontracting a logistics service?	2019	2018	2017	2016	2015	2014	2013	2012	2011	2010
QUALITY	85.2%	78.6%	79.7%	79.7%	78.6%	85.4%	75.5%	69.8%	77.2%	68.9%
SAVING	58.1%	54.7%	50.4%	61.4%	63.3%	63.7%	65%	61%	56.4%	65.9%
EXPERIENCE AND CONFIDENCE	50.1%	54.2%	53.4%	48.3%	53.1%	47.2%	45%	43.4%	48%	38.4%
FLEXIBILITY	62.8%	32.3%	53.8%	52.5%	52.7%	49%	52%	49.1%	48.5%	31.8%
SPECIALIZATION	34.2%	29.7%	21.6%	27.5%	21%	14.1%	14.5%	14.5%	20.8%	20%
SPEED	27.6%	26.6%	24.1%	21.6%	21.7%	13.7%	15.5%	14.5%	15.8%	33.1%
BUSINESS OPTIMIZATION	14.7%	13.5%	12.6%	13.6%	11.4%	8%	12.5%	9.4%	11.9%	9.8%
HUMAN RESOURCES AND EDUCATION	9.9%	5.7%	5.5%	7.2%	7.2%	0%	1%	3.8%	3.5%	2.6%

Service and quality, main concerns in logistics

Service and **quality** continue to occupy the first place as far as the main concerns for the Spanish shippers. 26.2% of the Logistics or Supply Chain directors who have participated in this study regard service and quality as their main concern, a figure that has increased a 4.3% with respect to the 2018 Barometer, and a 6.4% with respect to 2017.

In the second place we find the **speed, punctuality** and **commitment** with 16.2%, a figure that has been increasing in the last 10 years while the e-Commerce activity in our country has been growing. **Communication** and **information** (information technology) ranks third with 9.9%.

Another outstanding aspect of the present study is that aspects such as **efficiency** and **optimization of costs and stocks** have disappeared from the top positions of this ranking. These aspects in the last 6 years have occupied the second place for logistical concerns and this 2019 appears in eighth place with 3.8%.

It must be highlighted that **innovation** appears like one of the logistics preoccupations that has grown most in the last years. Innovation has grown a 0.3% compared to last year and has reached an 8.4%. In just 4 years, innovation has grown a 5.1%. Another concern to highlight is the **adaptation of the sector to 4.0 industry** with a 4.6%, an aspect that has risen a 1.1% with respect to 2018. **The concern for the evolution of the transport service** has also grown in the logistics world with a 6,7%.

What are your main logistic concerns?	2019	2018	2017	2016	2015	2014	2013	2012	2011	2010
SERVICE AND QUALITY	26.2%	21.9%	19.8%	20.6%	21.6%	22.9%	20%	18.4%	20.4%	15.8%
EFFICIENCY, COSTS AND STOCK OPTIMIZATION	3.8%	18.6%	17.7%	18.5%	20.1%	20.6%	20%	18.1%	17.6%	21.9%
SPEED, PUNCTUALITY AND COMMITMENT	16.2%	14.8%	14.5%	14.6%	15.3%	15.1%	13.8%	17%	12.9%	13.5%
COMMUNICATION AND INFORMATION (TECHNOLOGY)	9.9%	12.2%	6.9%	7%	6.7%	5.9%	6.7%	6.7%	7%	7.6%
INNOVATION	8.4%	8.1%	5.1%	4.1%	3.3%	4.7%	4.1%	4.7%	4.6%	2%
PLANNING	7.1%	7.1%	6.2%	5.7%	5.7%	5.6%	4.4%	5.7%	6%	2.7%
SUSTAINABILITY	6.2%	4.8%	4.5%	3.1%	3.5%	2.7%	3.6%	3.7%	4.7%	3.4%
ADAPTATION TO THE 4.0 INDUSTRY	4.6%	3.5%	0%	0%	0%	0%	0%	0%	0%	0%
UPLOADING AND DOWNLOADING IN URBAN AREAS	3.2%	2.6%	2.9%	2.1%	1.9%	1.7%	1.5%	1.8%	2.3%	1.3%
TRAIN INFRASTRUCTURES FOR GOODS	2.3%	2.5%	1.7%	2.3%	1.6%	1.6%	2.3%	1.3%	2.1%	2.6%
EVOLUTION OF THE TRANSPORT INDUSTRY	6.7%	2.3%	3.2%	2.5%	3.1%	3.3%	2.9%	3.9%	3.2%	8.4%
SLOWNESS IN PAYING	1.2%	0.9%	0.9%	0.2%	0.1%	0.9%	0.2%	1%	0.8%	2.4%
CURRENT UNCERTAINTY	1.1%	0.4%	1.1%	0.5%	0.3%	1.5%	1.9%	2.3%	1.7%	3.5%
HUMAN RESOURCES	3.1%	0.3%	0.3%	0.7%	1.1%	0.9%	0.8%	1.1%	1.1%	3.3%

The supporters of the implementation of the 44 tons have increased

The X edition of the SIL 2019 Círculo Logístico Barometer has once again confirmed that Spanish shippers are in favor of the implementation of 44 tons in the transport of goods by road with a 61.8%. This figure has increased by 5.1% compared to last year, although it is still far from the 76.7% recorded in 2014.

The number of the 44 tons detractors has also increased in the SIL 2019 Círculo Logístico Barometer. 11.3% of the logistics and / or Supply Chain directors who have participated in this study are against the implementation of the 44 tons, the highest figure recorded to date. Furthermore, 26.9% of the respondents are indifferent to this issue.

Are you in favor of the implementation of the 44 tons of maximum		2019	2018	2017	2016	2015	2014
YES		61.8%	56.7%	75%	70.9%	68.3%	76.7%
NO		11.3%	7.5%	4.7%	8.2%	6.1%	3.2%
DON'T KNOW		26.9%	35.8%	20.3%	20.9%	25.6%	20.1%

Companies invest more in sustainability than a year ago

Another significant aspect that emerges from the SIL 2019 Círculo Logístico Barometer has been the largest commitment of the loaders' companies to sustainable parameters, as 73.9% claim to invest many or enough resources in sustainable parameters. This represents an increase of 2.3% over last year. In addition, 23.6% say they invest little in sustainable parameters, a figure that has decreased by 1% compared to 2018. Only 2.5% of the Logistics Directors who have participated in the SIL 2019 Círculo Logístico Barometer affirms that their company invests nothing at all in sustainable criteria. This figure has also decreased a 1.3% with respect to 2018.

Does your company Invest in sustainable criteria?		2019	2018	2017	2016	2015	2014	2013	2012	2011	2010
YES, A LOT		23.6%	21.9%	42.8%	42.1%	39.6%	43.5%	33.5%	37.4%	43.2%	43.3%
YES, QUITE		50.3%	49.7%	36%	35%	40.2%	30.5%	49.5%	38.8%	34.4%	29.4%
LITTLE		23.6%	24.6%	19.5%	18.7%	17.8%	22.4%	16%	21.1%	19.3%	21.4%
NOTHING		2.5%	3.8%	1.7%	4.2%	2.4	3.6%	1%	2.7%	3.1%	6%

Collaboration in matters of transport will mark the logistics of the future

One of the conclusions that can be drawn from the SIL 2019 Círculo Logístico Barometer is that the Logistics or Supply Chain directors of the Spanish industry consider that the most important aspect of the logistics of the future will be the **collaboration with regard to transport matters** (40.1%). This figure has increased a 0.7% with respect to the Barometer carried out in 2018 and a 3.9% with respect to 2017. Another aspect that will become increasingly important will be the **exchange of standardized information** (39.8%), an aspect that has increased a 7.3% over last year.

Collaboration regarding storage (16.9%) ranks third in this barometer. Other aspects such as **robotization, blockchain, environmental impact, the improvement of loads on customer platforms** and **the enhancement of intermodality** represent 3.2% in terms of aspects that will be essential in logistics from the future.

What aspects will be essential in tomorrow's logistics?			
	2019	2018	2017
COLLABORATION IN MATTERS OF TRANSPORT	40.1%	39.4%	36.2%
EXCHANGE OF STANDARD INFORMATION	39.8%	32.5%	42%
COLLABORATION IN MATTEROS OF STORAGE	16.9%	25.1%	20.2%
OTHERS	3.2%	3%	1.6%

Important investments for the next 5 years

For the first time, the SIL 2019 Círculo Logístico Barometer has asked this year to the logistics and/or Supply Chain directors of the Spanish industrial companies what investment have they planned for the next 5 years in order to adapt to the 4.0 economy. In this sense, 42.2% of respondents said that their company's investment for the next 5 years will exceed one million euros.

57.8% of the logistics and/ r Supply Chain directors of the Spanish industry claim that their companies will invest less than one million euros to adapt to the 4.0 economy, while 27.7% say that they will invest an amount that will range between one million euros and five million euros.

On the other hand, a 5.8% of the respondents said that their companies will invest between 5 and 10 million euros and 5.2% between 10 and 50 million euros. Only a 3.5% of the logistics and/or supply chain directors of the Spanish industry that have participated in SIL 2019 Círculo Logístico Barometer state that their companies will invest more than 50 million euros in the next 5 years to adapt to the 4.0 economy.

What investment has your company foreseen for the next five years to adapt to the 4.0 economy?	
	2019
Less than € 1,000,000	57.8%
From €1,000,000 to €5,000,000	27.7%
From € 5,000,000 to €10,000,000	5.8%
From € 10,000,000 to €50,000,000 €	5.2%
More than € 50,000,000 €	3.5%

THE ORGANIZER: EL CONSORCI DE LA ZONA FRANCA DE BARCELONA

El Consorci de la Zona Franca de Barcelona is the first consortium created in Spain (1916). It is a public entity of economic dynamization that works mainly in the Barcelona metropolitan area.

Its main activity is to manage the Industrial Polygon of the Zona Franca and the Zona Franca Aduanera, as well as managing its assets and favoring the international projection of Barcelona, Catalonia and Spain in the exhibition, logistics and real estate sectors. For this purpose, it has more than 12,000,000 sq.m. of industrial and urban land, in different phases of execution.

Its corporate mission is to encourage the social progress and job creation with industrial and logistic implementation, the development of business and of sceneries for the economic activity, and the technological transference. In each historical cycle, it has contributed to the economic and social growth with pioneer initiatives.

The managing organisms of the entity are representatives of the main entities in the Barcelona economic ambit, representatives from the Barcelona City and the Government of Spain: plenary decisions reflect its spirit of public-private agreement.

El Consorci de la Zona Franca is a main booster of the economic potential of the city of Barcelona and its metropolitan area.

The Catalan capital is the nucleus of the metropolitan region: 2,500 sq.m., close to 5,000,000 of inhabitants, a 10% of the Spanish population. Its dynamic and diversified economy generates a 19% of the GDP and of the Spanish exports (Barcelona in numbers).

As a business landing platform in this area, the Consorci manages the great Industrial Polygon of the Zona Franca, with 4,700,000 sq.m. and almost 150 companies: a global productive platform whose industrial and logistic warehouses enjoy a privileged connectivity thanks to its easy access of the port, the airport, several international links and the main goods train stations.

Also, El Consorci is a public real estate developer with a strong prominence in the Barcelona area, where it is developing singular offices and buildings, that generate richness and business activity, and regenerates urban areas to improve urban planning and quality of life of its inhabitants.

As a creator of spaces for productive economy and technological transfer, inside and outside the city of Barcelona, it also reinforces the projection of local economy through international renowned business events, such as the real estate exhibition Barcelona Meeting Point (BMP) and the Leading Exhibition for Logistics, Transport, Intralogistics and Supply Chain in Southern Europe (SIL).

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