

13th EDITION OF THE LOGISTICS CIRCLE INDICATOR AT SIL 2023: FROM THE 7TH TO THE 9TH OF JUNE

Spanish Logistics departments in increase their commitment towards SDGs

- 94.5% of companies says that they will carry out practices towards achieving UN's 2030 Agenda Sustainable Development Goals.
- 974 Logistics and Supply Chain managers have been part of the Logistics Circle Indicator at SIL 2023; they affirm that quality (82.6%), experience (64.6%) and savings (58.3%) are the most important points when outsourcing logistics services.
- Forecast for investment is increasing at industrial companies for the next 5 years in order to adjusting towards Industry 4.0; logistics manager importance is increasing within companies.

Barcelona, 18th April 2023. – This year 2023, SIL's 23rd edition –leader fair in terms of Logistics, Transport, Intralogistics and Supply Chain in Southern Europe– is organising the 13th Logistics Circle Indicator 2023 where Logistics industry is profoundly analysed. 974 Spanish Logistics and Supply Chain managers –from different Industry's sectors– have participated in this study as they are members of the Logistics Circle 2023. The profile of the sector of activity of the different Logistics or Supply Chain managers who participated in this 13th Logistics Circle Indicator:



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»»» What is your sector of activity?

FOOD AND DRINKS	15,5
MASS-MARKET RETAILING	14,6
CHEMICAL	14,2
PHARMACEUTICAL AND HOSPITAL	11,3
ELECTRONICS	6,7
HEALTH AND COSMETICS	6,6
FASHION AND ACCESSORIES	6,2
ENERGY AND ENVIRONMENT	4,9
AUTOMOTIVE	4,8
EQUIPEMENT AND MACHINERY ASSETS	2,9
STEEL AND METALLURGY	2,3
CONSTRUCTION AND REAL ESTATE	1,7
SPORT	1,5
HOME	1,1
OTHERS (HARDWARE, PAPER AND ADVERTISING CLAIM...)	5,7

94.5% of companies are committed towards SDGs

Other of the conclusions taken from the 13th Logistics Circle Indicator at SIL 2023 is that **94.5%** of Spanish industrial companies express their commitment towards UN's 2030 Agenda Sustainable Development Goals. This figure represents an **almost-one-percent** increase in comparison to last year's indicator. Among them, **35.4%** says that they are **extremely committed** with SDGs, a figure 5.6% higher in comparison to 2022 study.

41.8% of Logistics and/or Supply Chain managers who have been part of this study affirm that their companies are **carrying out several actions** towards achieving SDGs, which implies a light setback in comparison to last year's figure.

Finally, the number of companies who manifest being slightly committed with UN's SDGs has decreased (**17.3%**; 4% less than 2022). The companies who do not carry out any action towards achieving these goals are a 5.5%, a 0.9% less than last year.

BARÓMETRO CÍRCULO LOGÍSTICO SIL 2023



2023



Logistics manager, a position increasingly more important

Other of the conclusions taken from the 13th Logistics Circle Indicator at SIL 2023 is that more than a half of the Spanish industrial companies (**58.9%**) gives more importance to Logistics manager position and considers it a key role within the company. This figure is slightly higher than last studies; a 3.7% higher than last year.

34.6% of respondents thinks their own companies' CEOs consider Logistics manager role as **essential**. This figure is a 7.7% higher than 2022's one, as well as a 15.5% higher in comparison to 2019. At the same time, a **24.3%** thinks that their own companies' CEOs consider their role as **extremely important** –this figure is a 4% less than last year. Lastly, a **15.4%** says their position is **slightly regarded** (21.1% in 2022); a **24.3%** affirms that it **should be more regarded** (23% in 2022); and a **1.4%** says that it is **absolutely undervalued** at their companies (0.7% in 2022).



Leadership, team management and strategic vision

“**Leadership capacity**” and “**team management**” are the most important attributes a good Logistics manager should have according to a **21.9%** of Logistics or Supply Chain managers who have been part of this Logistics Circle Indicator’s edition. This figure represents a 1% more than last year. The second place is for “**having a strategic vision**” (**18.5%**; 1.9% more that in 2022).

Following the already-detected negative evolution at last year’s Indicator of the attribute “**being analytic**” –2020’s most regarded attribute–, this year it represents a 13.6%, a 0.3% less than last year. The same evolution characterises “**planning ability**” (12.1%; 12.5% in 2022) and Logistics manager “**innovative ability**” (10.3%; 11.7% in 2020; 34.5% in 2020).

“**Bargaining power**” (7.7%) occupies the 6th place, followed by “**sympathy**” (6.3%). In addition, “a good Logistics employee” is someone with “**digital mind-set**”, “**good training**” and who has “**contacts**”, according to the 974 Logistics or Supply Chain managers who took part of the 13th Logistics Circle Indicator.

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»»» What is the main attribute that a good Logistics Director should have?

HAVE LEADERSHIP AND TEAM MANAGEMENT CAPACITY	21,9
HAVE STRATEGIC VISION	18,5
BE ANALYTICAL	13,6
HAVE ORGANIZATIONAL CAPACITY	12,1
BE INNOVATIVE	10,3
NEGOTIATION CAPACITY	7,7
HAVE EMPATHY	6,3
HAVE A DIGITAL MINDSET	3,8
HAVE CONTACTS	2,2
HAVE A GOOD EDUCATION	3,6

More visibility for Logistics thanks to the Covid-19 pandemic

In recent years, the Logistics industry has gone from being an unknown to being considered by everyone as a key sector for the Economy and a sector of fundamental necessity. Covid-19 pandemic has undoubtedly been the main cause that has contributed the most to Logistics visibility as a fundamental-necessity industry among citizens. More than half of Spanish Logistics and Supply Chain managers –55.4% specifically– confirms that. This figure represents a 9.1% more than last year’s Indicator.

E-commerce is other of the main causes which has contributed to Logistics industry visibility as a fundamental necessity. Several managers agree on the current **e-commerce boom (34.9%)**, but this figure is 6.7% less than last year. A **8.6%** of Spanish Logistics and/or Supply Chain managers consider that the **microchip supply crisis** has also contributed to this, while only a **1.1%** mentions other causes like the **lack of professionals** within the Industry or the necessity of other **components for acquiring competitiveness**.

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What aspect has contributed the most to the visibility of logistics as a sector of first need among citizens?

THE COVID-19 PANDEMIC	55,4
THE RISE OF E-COMMERCE	34,9
THE MICROCHIP CRISIS	8,6
OTHERS	1,1

Outsourced-logistics activities maintain stable

There are not important changes observed in the trend in terms of outsourced-logistics activities by companies. The most outsourced-logistics activity is undoubtedly **transport**, as it has also been observed at last Logistics Circle Indicators. **95.7%** of the Logistics and Supply Chain managers who have been part of the 13th Logistics Circle Indicator at SIL 2023 says that **transport** services are outsourced at their companies. This figure has slightly decrease 0.5% in comparison to 2022. Therefore, **transport** is this category's undisputable leader with a large distance from the second most outsourced activity, which is **supply** again (**50.4%**). Supply suffers a 2.4-percent decrease in comparison to last year, and an 8.9-percent in comparison to 2020.

Purchase activity receives the most important change in this category. Even though it maintains the 7th place –with **4.9%**–, it increases a 1.8%.



04

»»» What logistics activities does your company usually subcontract?

TRANSPORT	95,7
DISTRIBUTION	50,4
PACKING AND PACKAGING	29,1
MAINTENANCE AND MANAGEMENT OF STOCKS	22,1
SYSTEMS AUTOMATION	17,2
PRODUCTION	9,2
SHOPPING	4,9
OTHERS	3,5

Quality, experience and savings: the most valued points

Quality is still the most valued aspect –83.6%, a 0.2% slightly higher than last year’s study– by Spanish Logistics or Supply Chain managers in terms of outsourcing a logistics service.

“**Experience and confidence**” is the second most valued aspect, with a **64.6%** –5.4% higher than last year’s Indicator. **Savings** occupies the third place with a **58.3%**, 9.9% more than last year.

Another remarkable aspect at this year’s study is the drop of last year’s second place to the fourth one. This aspect is **flexibility**, with 47.9% (61.1% in 2022).

Rapidity (31.3%) and **business optimization** (10.4%) are two of the aspect which improve in comparison to last year.



05

»»» What aspects do you value when outsourcing a logistics service?

QUALITY	82,6
SAVING	58,3
EXPERIENCE AND REALIABILITY	64,6
FLEXIBILITY	47,9
SPECIALIZATION	30,6
SPEED	31,3
BUSINESS OPTIMIZATION	10,4
HR AND EDUCATION	2,8

Transport evolution and talent became two of the main logistics worries

“**Service and quality**” (21.5%) is still –for the second year in a row– the main worry for Spanish shippers. In spite of that, this figure is 0.4% less than last year. The second place is occupied by “**efficiency and stock and expense optimization**” (18.7%) with an extremely similar figure in comparison to 2022 (only a 0.2-percent drop). “**Rapidity, punctuality and commitment**” also suffers a 2.1-percent drop, but it maintains the third place with a **11.8%**.

Sustainability becomes the fourth logistics worry for Spanish shippers (**7.9%**; 6.6% in 2022). It is important to say that last year sustainability occupied the sixth place, thus we observe a greater awareness towards sustainable points within the Industry.

“**Transport industry evolution**” –which occupies the sixth place– experience the most highlighted and significant changes of this category this year with a 7.1%. This figure is 2.9% higher than Logistics Circle Indicator 2022.

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On the other hand, topics related to **talent** (recruitment of qualified staff) and **HR** experience a 1.4-percent increase and is the main logistics worry for 5.9% of the Logistics and Supply Chain managers from different Industry's sectors who have been part of this year's study.



»»» What are your main logistics concerns?

SERVICE AND QUALITY	21,1
EFFICIENCY & COST & STOCK OPTIMIZATION	18,7
SPEED, PUNCTUALITY AND COMMITMENT	11,8
COMMUNICATION AND INFORMATION (CONTROL TECHNOLOGY)	6,2
INNOVATION	3,3
PLANNING	7,7
SUSTAINABILITY	7,9
4.0. INDUSTRY ADAPTATION	3,3
LOADING & UNLOADING IN URBAN CENTERS	1,3
RAILWAY INFRASTRUCTURES FOR FREIGHT	1,6
TRANSPORT SECTOR EVOLUTION	7,1
LATE PAYMENT	0,6
CURRENT UNCERTAINTY	3,5
HR	1,5
RECRUITMENT QUALIFIED STAFF	4,4

Automated operations will shape the logistics of the future

Another conclusion taken from 13th edition of the Logistics Circle Indicator's at SIL 2023 is the importance of “**partnership in terms of transport**” (28.4%) as the most important aspect of the future Logistics –as claimed by the Spanish Logistics and Supply Chain managers. The second place is occupied by “**automation of operations**” (27.1%), which means that they have exchanged positions in comparison to last year. “Partnership in terms of transport” increases a 2% and “automation of operations a 5%.

The third place is occupied by “**standardised information exchange**” (21.4%), a 2.7% less than in 2022. Other operations as “**partnership in terms of storage**” (10.5%; 7.7% in 2022) or “**service customization**” (9,8%; 7.4% in 2022) have significantly increased.

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What aspects will be essential in the logistics of the future?

COLLABORATION IN TRANSPORTATION	28,4
EXCHANGE OF STANDARDIZED INFORMATION	21,4
STORAGE COLLABORATION	10,5
THE AUTOMATION OF OPERATIONS	27,1
THE PERSONALIZATION OF THE SERVICE	9,8
OTHERS	2,8

Forecast for investment is increasing at industrial companies for the next 5 years

With regard to the investments foreseen by companies for the next 5 years to adapt to the Economy 4.0, it should be noted that these investments are slightly higher than in the last Indicator, carried out in 2022. **55.4%** of Spanish Logistics and Supply managers says that their companies **will invest less than a million** euros in order to adapt themselves to Economy 4.0. This figure is 1.1% higher than last year.

Nonetheless, it is observed that the gap where future investment is foreseen is also the one who receives **greater investment (more than 50 million euros;** 4% more than in 2022). In this sense, a 6.4% of Spanish Logistics and Supply Chain managers from different Industry's sectors –who have been part of this year's Logistics' Circle at SIL– are thinking of making higher investments –more than 50 million euros– the next 5 years.



The “44-tons policy” is still leading, but its support decreases

13th edition of the Logistics Circle Indicator at SIL sees a drop in terms of **shippers who are in support of the “44-tons policy”** at road freight transport (**56.9%**; 58% in 2022; 65.7% in 2020). It is also important to highlight that the mayor part of shippers support the policy, but this backing is decreasing.

On the other hand, the number of **people against the policy (14.6%)** is still increasing in this edition, with a percentage 3.8% higher than last year, and 6% higher than in 2020. This **issue seems to be irrelevant** to a 28.5% of the respondents.



Are you in favor of the implementation of a maximum load of 44 tons in the road freight transport sector?

YES	56,9
NO	14,6
DON'T KNOW	28,5