



CIMALSA



**THE LOGISTIC HUB
IN SOUTHERN
EUROPE**

More From logistics



June 2015



CIMALSA
Centres logístics
de Catalunya



**Generalitat
de Catalunya**

www.cimalsa.cat





**LOGISTICS AND
TRANSPORT HUBS**

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BARCELONA - CATALONIA

THE LOGISTIC HUB IN SOUTHERN EUROPE

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Barcelona and Catalonia

Barcelona is famous for its history, art, climate, landscape and **lifestyle**.

However, Catalonia also enjoys a dynamic, industrial, diverse and extremely **business friendly economy**.



The Catalan economy is well-known for having an excellent mix of competitive factors.

- **Talent**, creativity and education. A strong work ethic. Competitive salaries.
- **International atmosphere**. Dynamic, trade focused and a magnet for incoming investment.
- **Diverse industrial base**. An industrial powerhouse. Quality products and services.
- Business mentality. Flexible and **innovative**.



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Catalonia. Some data.

Dynamic Economy

Area: 32,106 sq km
Population: 7.4 million (2014)
GDP: € 203.62 billion (2013)
GDP per capita: € 26,666 /year (2013)
Companies: 586,443 (2014)

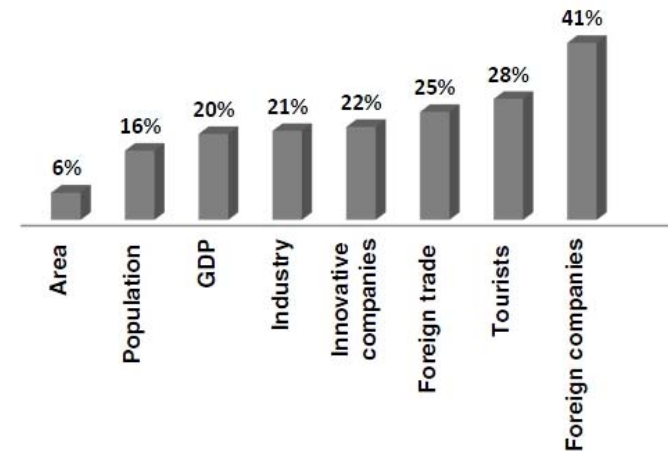
Open & Global

18.3 million foreign tourists/year (2014)
€ 60.2 billion exports (2014)
€ 71.9 billion imports (2014)
5,708 foreign companies (2014)
€ 3,850 million foreign investment (2013)

Innovative

8,206 innovative companies (2013)
1.5% of GDP dedicated to R&D (2013)
1.0% of world's scientific production

Compared to Spain...



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Strategically located. Globally connected.

Barcelona is one of the few cities in Southern Europe with full-modal transport integration. International port and airport, high-speed railway and motorways within a 12-kilometre radius, each with global connectivity.

80 airlines
140 destinations worldwide
Over 35 million passengers
Best South European Airport
Best European Cargo Airport



Airport



City Centre

Port & Logistics



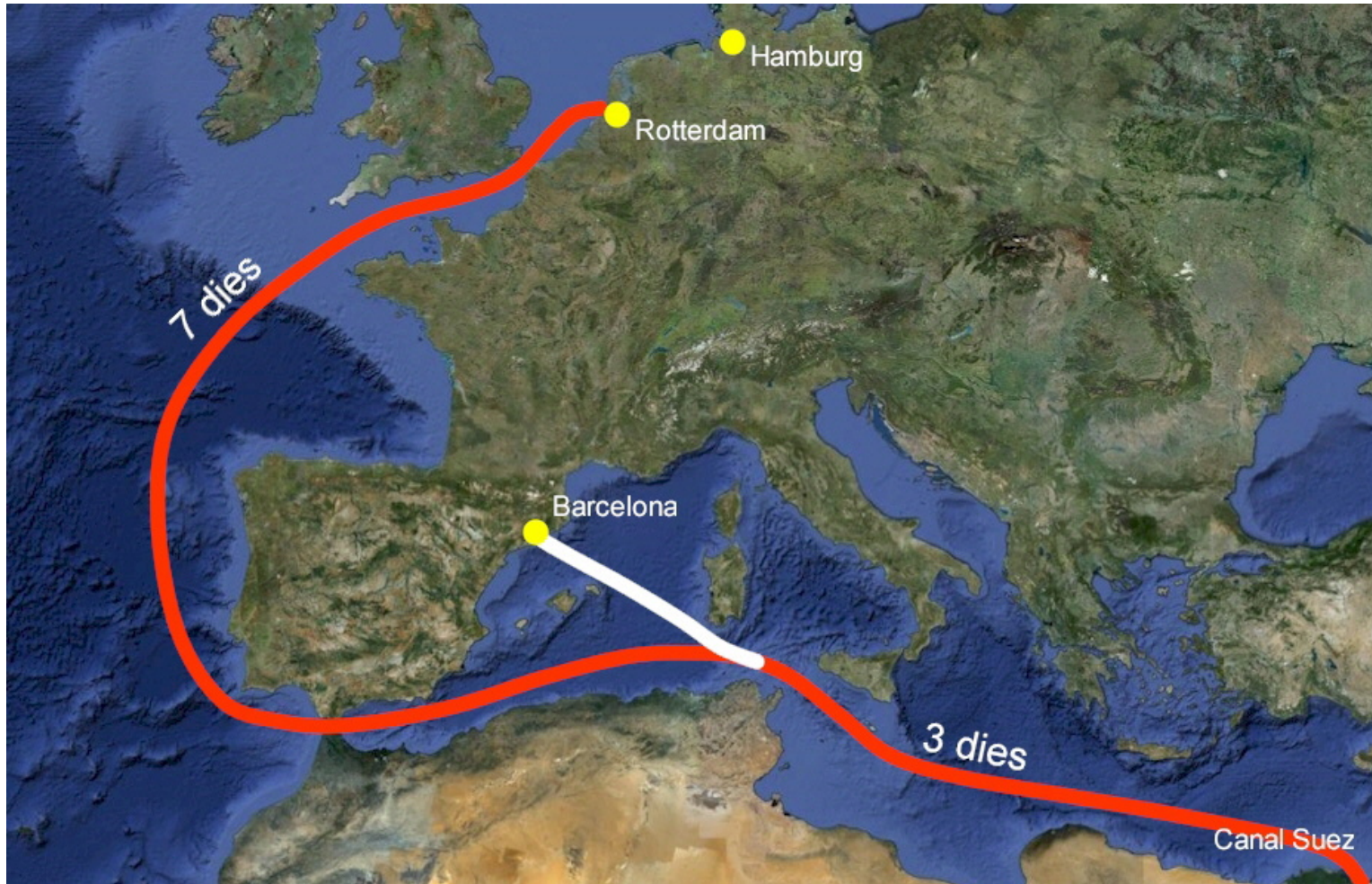
Excellent road network connecting internal market. The Mediterranean Rail Corridor, a EU priority project.



Leader in the Mediterranean in vehicle traffic. 1st semi-automated Mediterranean terminal. A 259-ha of logistics activity area, leader in Southern Europe.



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Figure 1: The 'Blue banana' of EU logistics activities



Source: Cushman & Wakefield, 2009



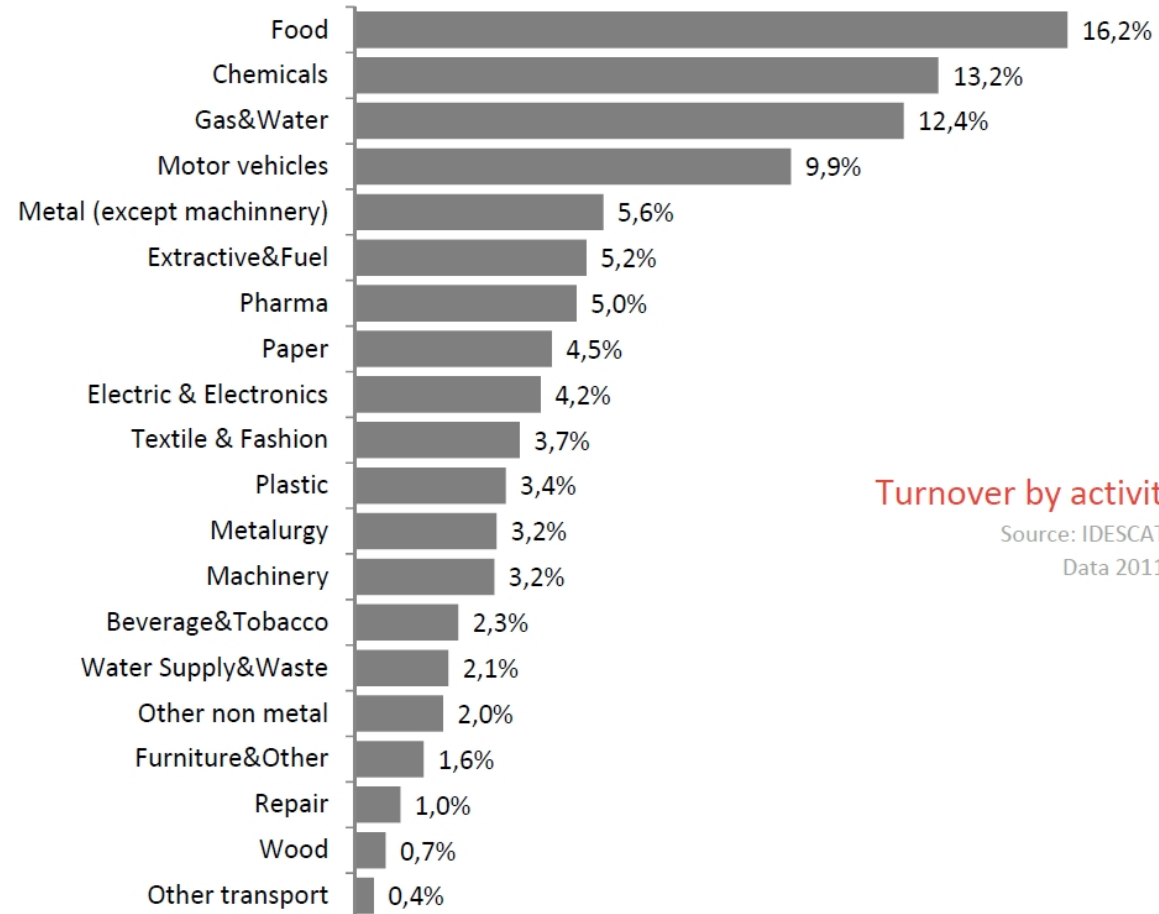
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FERRMED Great Axis Network



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Diverse productive base



Turnover by activity

Source: IDESCAT.
Data 2011.



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A diverse, dynamic & industrial economy.

International Catalan companies



International companies in Catalonia (5,700)



High SME presence

Companies in Catalonia

Total	590,629
Industrial	37,977
Construction	74,908
Services	473,558

Number of workers

Self-employed	322,762
1-9	233,319
10-49	23,329
50-199	4,882
200 or more	2,151

Source: Idescat DIRCE (2014)



The importance of industry

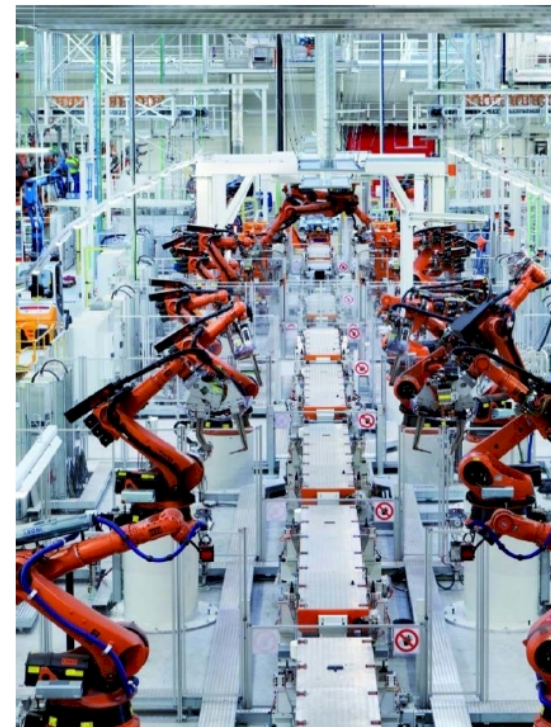
Agriculture: 0.9 % of GDP

Industry: 20.3 % of GDP

Construction : 10.6 % of GDP

Services: 68.2 % of GDP

- Balance between industry and services.
- Small and medium sized enterprises.
- High quality standards.
- Availability of suppliers and providers.
- Diversified industrial production.



SEAT Factory in Martorell



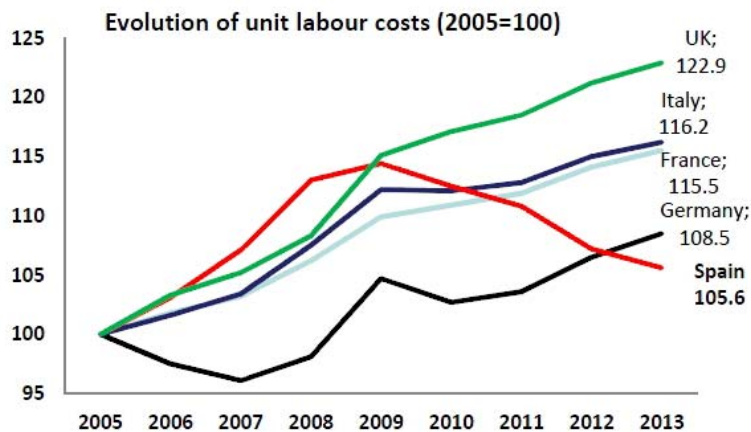
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Labour costs and productivity

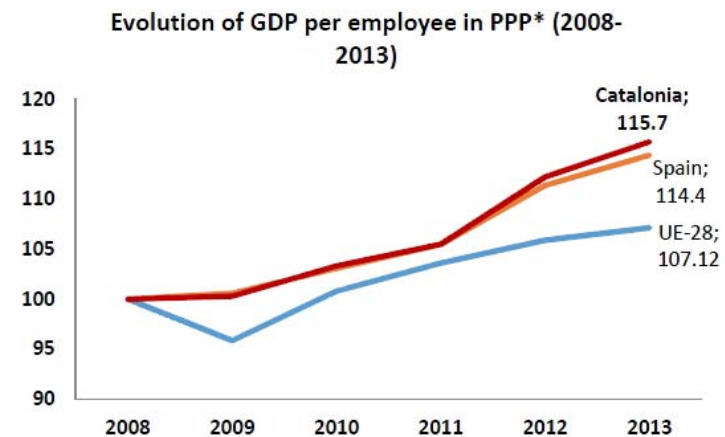
Spain's labour cost competitiveness is strong and has improved since 2009

In 2013 Spain's labour cost has advantage over Germany, France, Italy and UK
In 2013 average annual total wages and salaries in Catalonia was € 24,000

Labour Productivity in Catalonia grew 15.7% from 2008 to 2013
Productivity in Catalonia is higher than that of Spain and the EU-28



Note: Unit labour costs (ULC) measure the average cost of labour per unit of output and are calculated as the ratio of total labour costs to real output. Source: OECD Statistics.

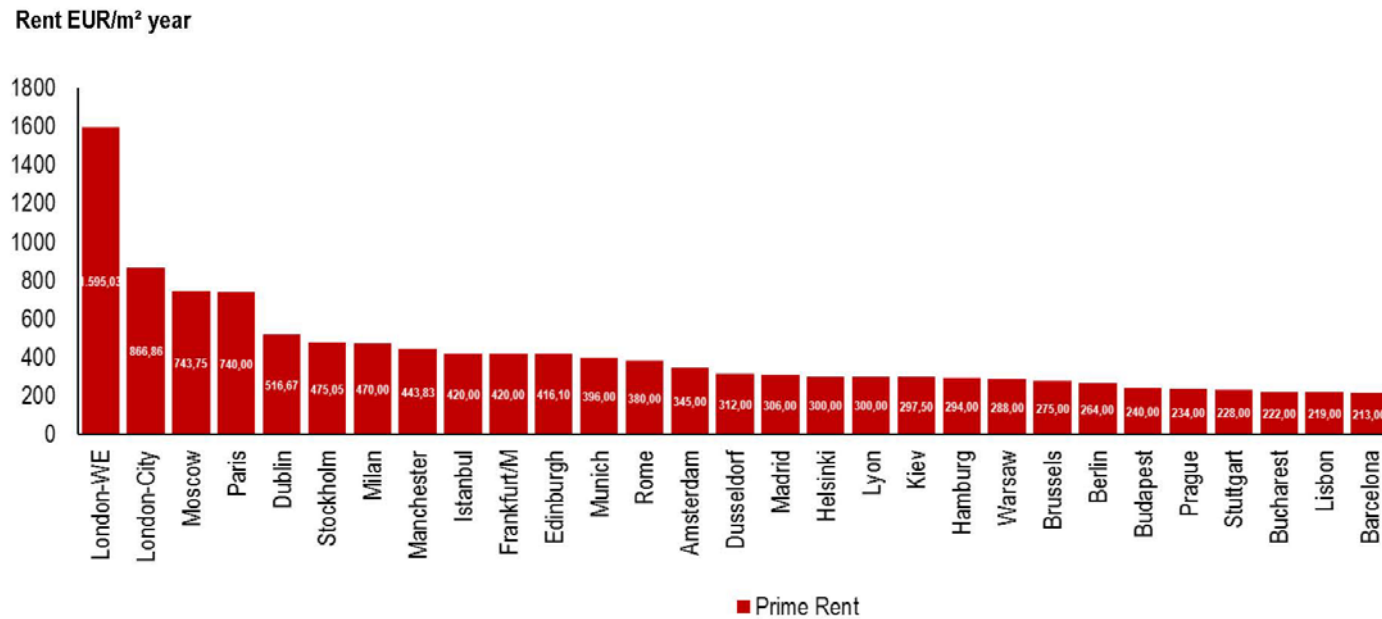


*Note: PPP stands for Purchasing Power Parity. Index EU-28 = 100. Source: IDESCAT.



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Prime rents 2014 Q4



Source: JLL, January 2015



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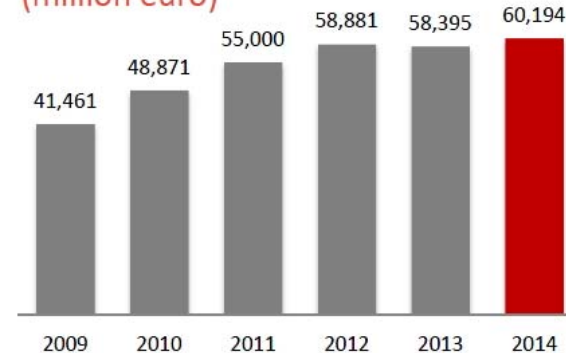
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Catalan exports.

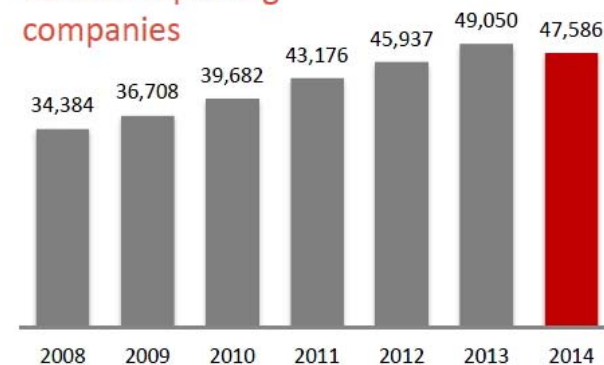
30% of Catalan GDP
25% of Spanish exports
32% of Spanish exporting companies

- Catalan exports in 2014 came to 60,194M EURO.
- Main export sectors are chemicals(17.5%), automotive (16.3%), food & drink (11.6%), textile and fashion (7.6%), pharmaceuticals (6.9%) and machinery (6.3%).
- 65% of Catalan exports are within the EU.
- 34% of Catalan exporting companies (47,586) do so on a regular basis (15,946).
- 6,200 affiliates abroad of Catalan companies

Export value
(million euro)



Catalan exporting
companies



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Traffic indicators

	2013	2014	
Tràfic total (tones)	41,5 milions	45,2 milions	+ 9 %
Contenidors (TEU)	1,7 milions	1,9 milions	+ 10 %
Export (plens)	582.160	618.926	+ 6 %
Import (plens)	391.876	437.059	+ 12 %
Short Sea Shipping (UTI)	xxx	xxx	x %
Granels sòlids (tones)	4,4 milions	4,8 milions	+ 9 %
Granels líquids (tones)	10,7 milions	12,9 milions	+ 17 %
Automòbils (unitats)	705.876	744.378	+ 5,5 %

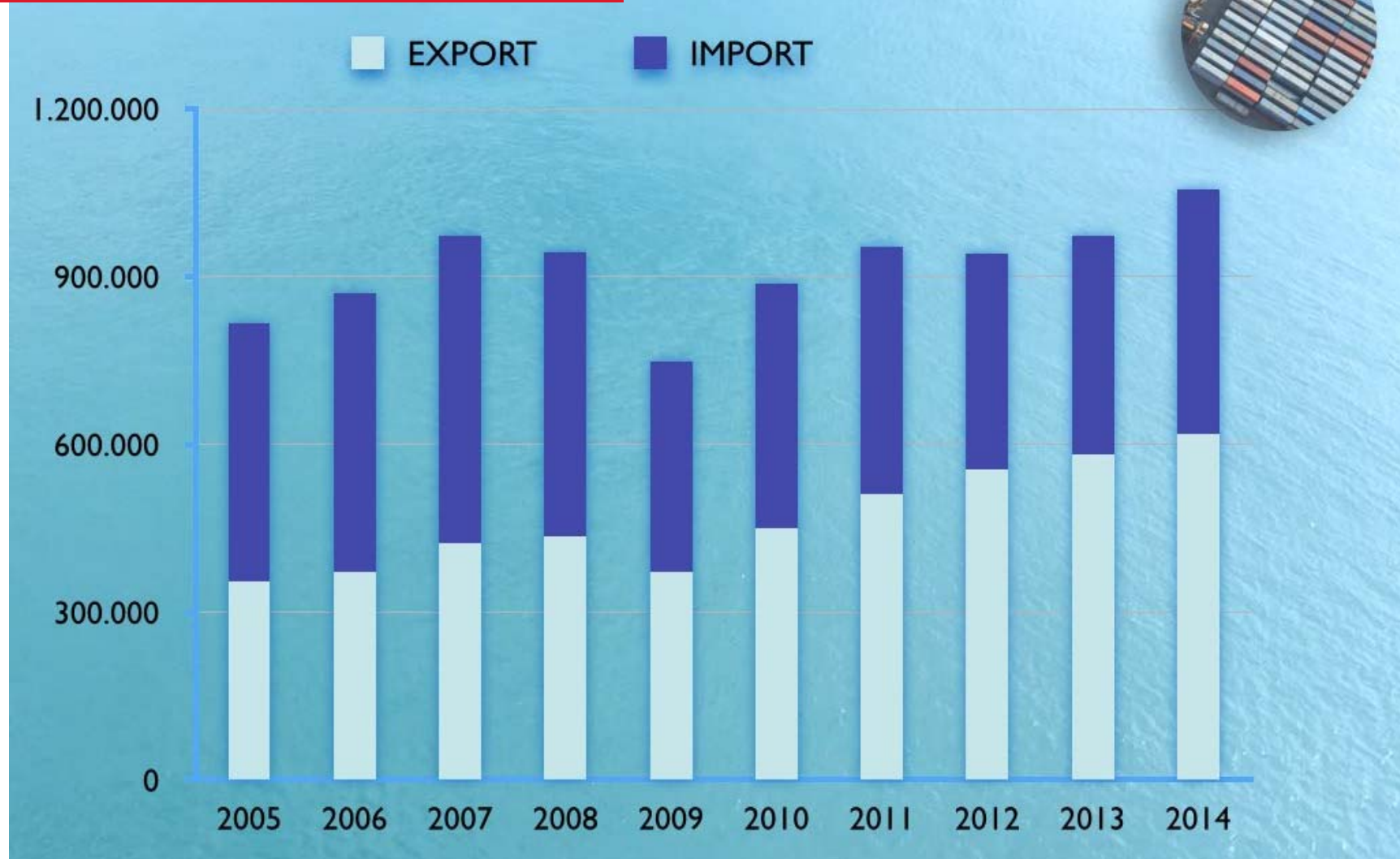
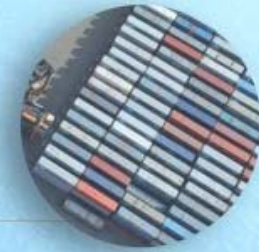


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Evolution (2005 – 2014)

Containers



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Leading scientific facilities.

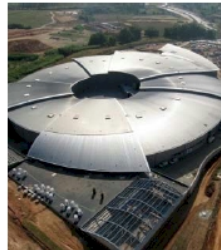
Renown applied and basic research groups supporting technological transfer and a complete network of scientific and tech centres represent the base for Catalonia's research and innovation programme.



IDIADA automotive testing facility



ALBA Synchrotron



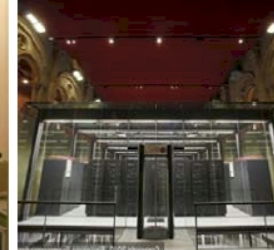
Tech & Science parks



IMB CNM



Supercomputing centre



A wide range of hospitals, universities and research groups all pioneers in oncology, life sciences, nanotechnology, photonics, etc.

TECNIO centres for technology transfer in different areas which give added value to business projects.



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ICT, mobility & Smart Cities



Barcelona is the world capital in mobility in all aspects. Over 2,300 mobile tech companies employ over 39,000 people with a turnover of 5 billion euros per year



Headquarters of the GSMA Mobile World Congress, with a turnover of 3.5 € Billion (2013-2018)

Mobile World Hub: coworking and business activity all year round

Incentives for mobile technology entrepreneurs

Smart City Protocol Society, the international body created to establish global Smart City standards.

Smart Cities Cluster to strengthen Barcelona's urban innovation strategy, promote business and academic cooperation as well as public-private collaboration.

Smart City Expo World Congress: the first and only sectorial trade fair, held in Barcelona since 2011.



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Talent & Education.



13 Universities
600 Degrees

221,000 students

Home to some of the world's most respected business schools



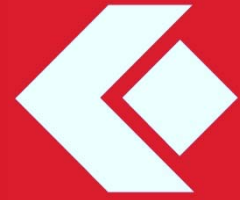
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■ Solid, collaborative work ethic.



Dedicated
Committed
Serious.
Cooperative.
Solution-oriented.
Pro-active.
Responsible.
Teamworkers.





INCASÒL & CIMALSA

INCASÒL & CIMALSA



INCASÒL Catalan land institute

CIMALSA Logistics Centers in Catalonia

Public companies Government of Catalonia

**Implement the government's land, housing
and industrial development policies.**



Incasòl·Cimalsa figures

Companies settled

2,550

Sectors developed

386

Industrial and logistics
space developed

4,800_{ha}

Housing units constructed

33,300

Potential housing units

74,000_{ha}

Residential space developed

2,100_{ha}

Families relocated

7,900

Neighborhoods
renovated

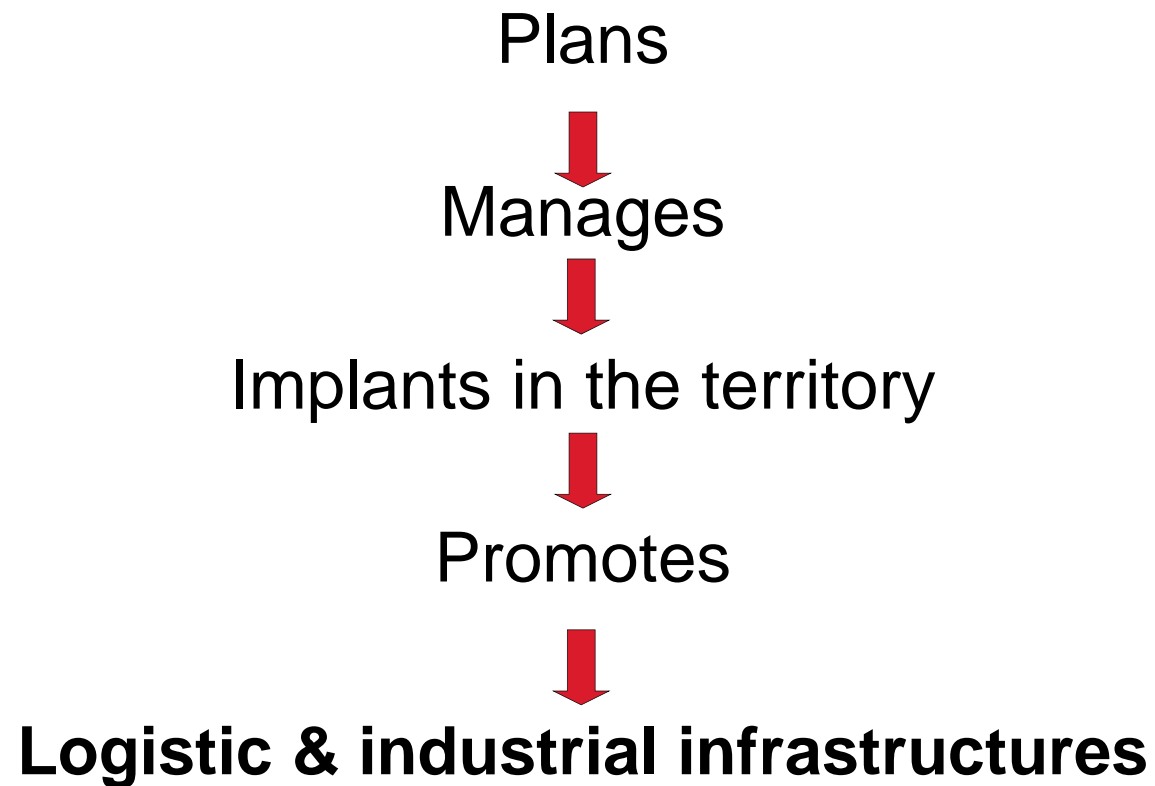
24

Heritage projects

700

Investment 5,200_{M€}





**Objective: stimulate the development of
The Catalan Economy.**

Through

Public and private enterprises

Cimalsa & Incasòl ready to collaborate in initiatives

For to share common objectives



INCASÒL & CIMALSA

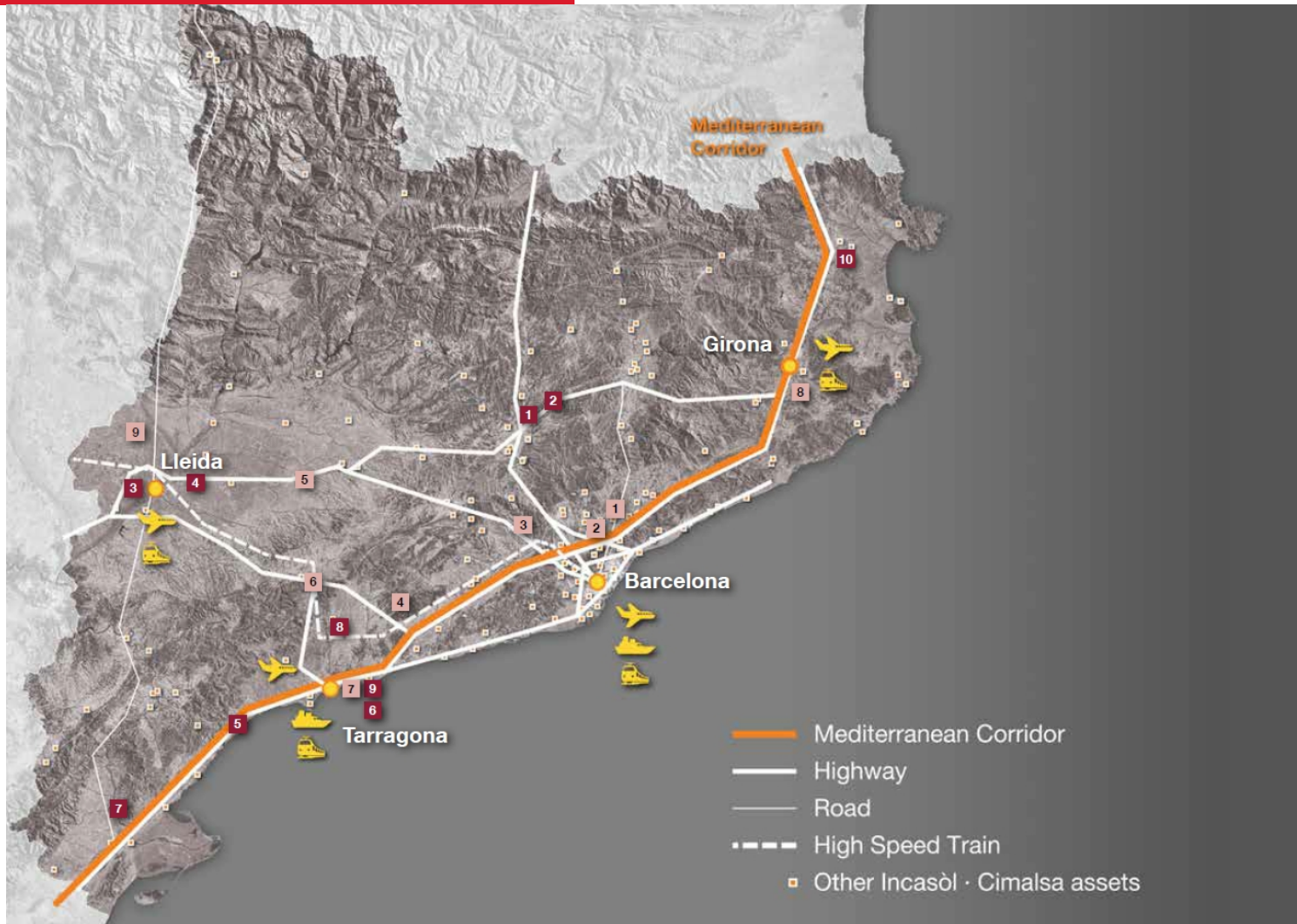
INSTITUTIONAL ACTIVITY





**INFRASTRUCTURE &
PROJECTS LOCATION**

Infrastructure & projects location



Infrastructure & projects location

CIM VALLÈS

The North Metropolitan Logistic Platform



Infrastructure & projects location

INTERMODAL LOGIS EMPORDÀ



160 hectares for logistics activities & Intermodal Terminal



Infrastructure & projects location

Central Catalonia LOGIS BAGES

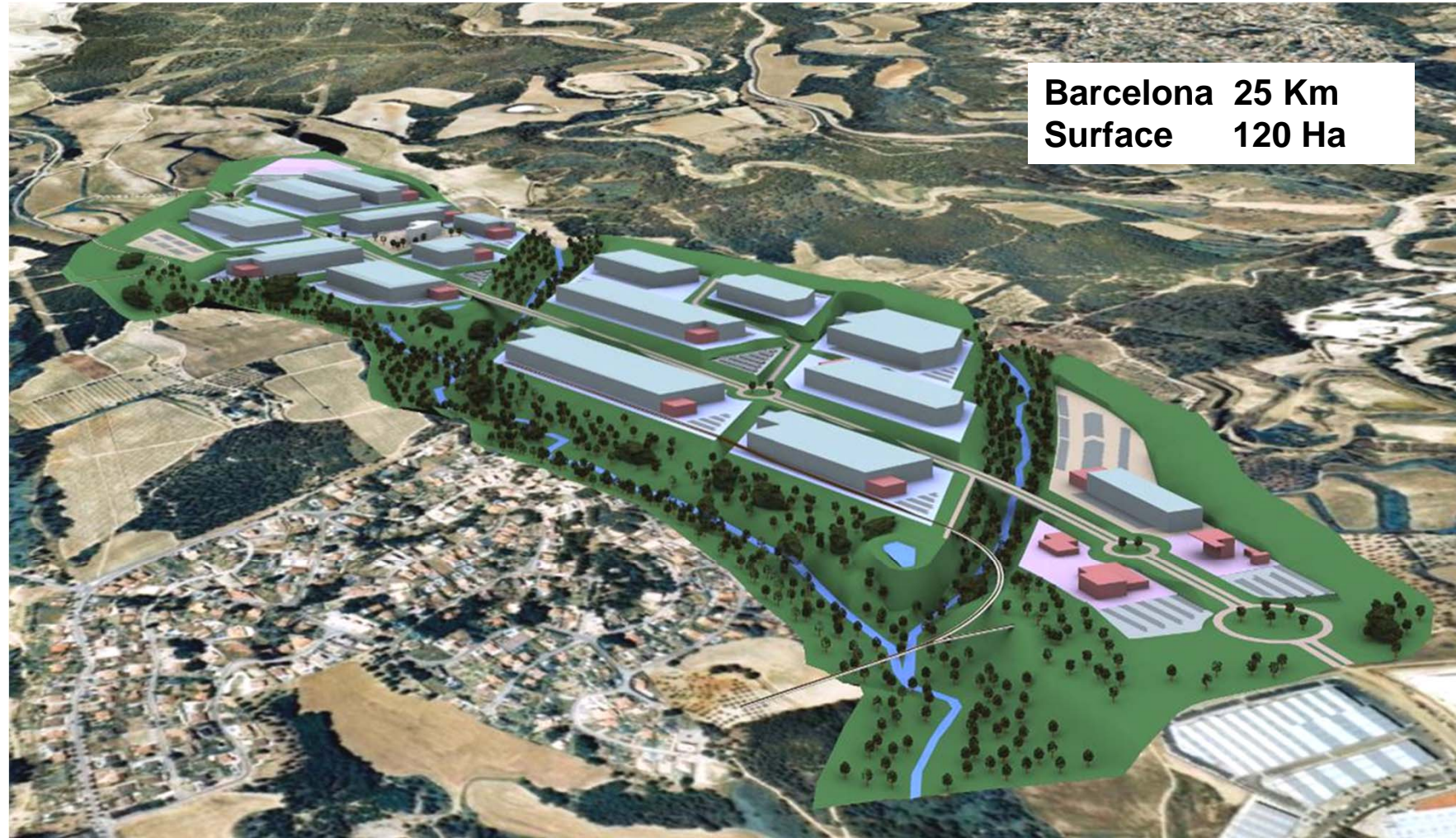


Total surface area	8,7 Ha
Warehouse Surface	53.000 sqm
Construction Year	2007



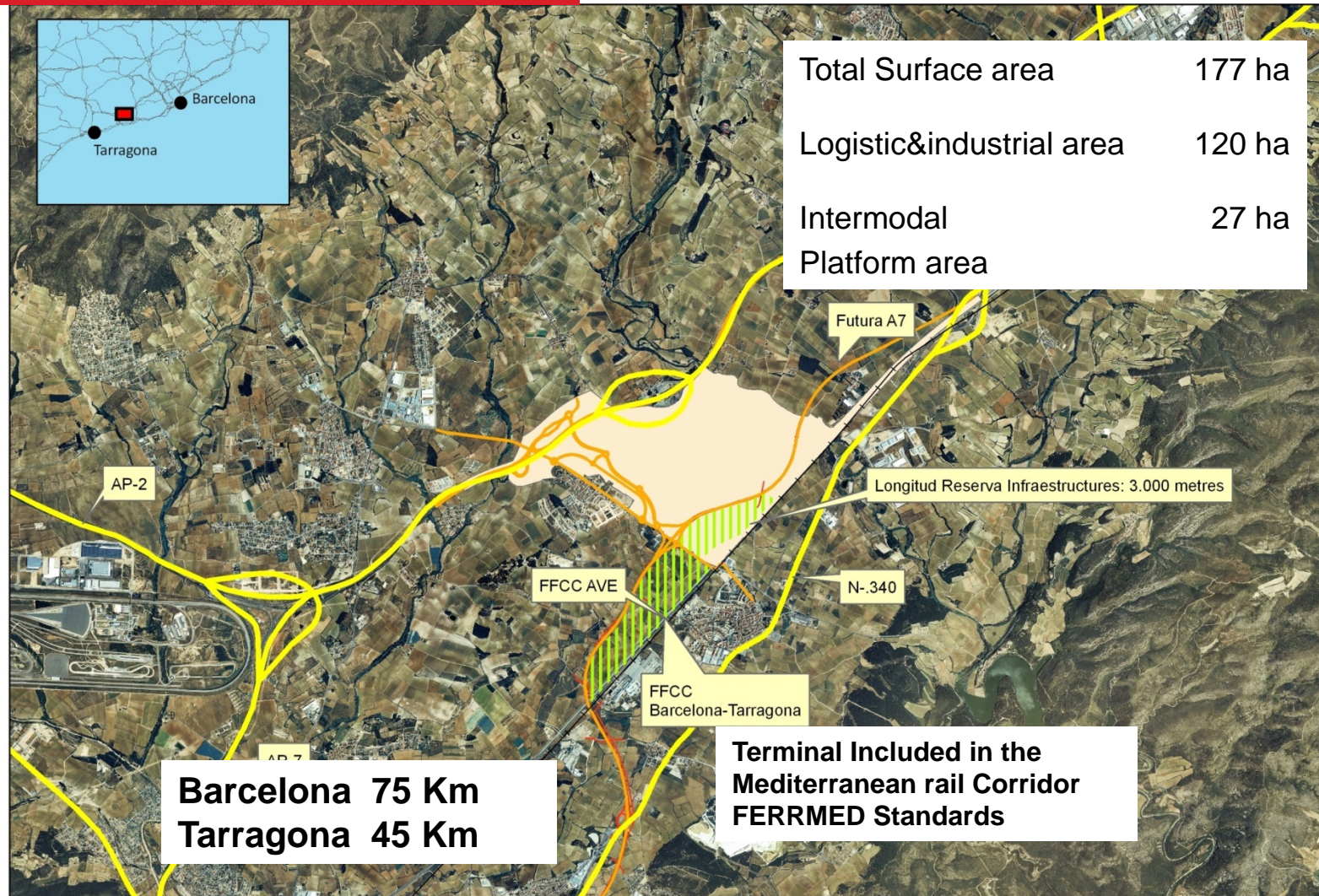
Infrastructure & projects location

NEW Metropolitan Project CIM LLOBREGAT



Infrastructure & projects location

LOGIS INTERMODAL PENEDÈS





**FOREIGN
INVESTMENTS**

Foreign Investments

- In 2014, Catalonia was the 1st Continental Western European Region on attracting foreign investments (ordered by number of projects attracted and employment creation)

	REGION	NUMBER OF PROJECTS	INVESTMENT (M. Euros)	EMPLOYMENT
1	South East (UK)	437	11.122,7	27.445
2	Ireland	168	4.116,0	12.382
3	Scotland	112	3.403,5	10.824
4	Catalonia	103	1.891,7	6.458
5	Ile-de-France	100	1.406,5	4.207
6	Southern Finland (Etela-Suomen laani)	92	939,1	1.794
7	Switzerland	87	1.400,2	2.370
8	West-Nederland	85	2.039,6	4.015
9	Nordrhein-Westfalen	83	1.049,3	2.649
10	Hessen	60	1.385,4	3.117
	TOTAL	1.327	28.754	75.261

Font: GENCAT based on FDI Markets (a service from the Financial Times Ltd.)





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