

The Barcelona Advantage



The Barcelona Advantage



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1. Why Barcelona?

Industry and consumption concentration

Economic relevance

6.3% Spanish area and 16% Spanish population, account for:

- 20% of GDP
- 23% of Industry
- 25% of foreign trade
- 35% of exporting companies
- 45% of foreign multinationals

Global Companies HQ



MANGO



Dezigual®



Global clusters

Automotive, chemical, pharmacy, fashion....

Fashion and footwear

ZARA
MANGO
DESIGNAL

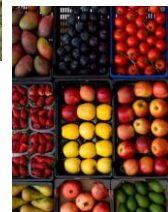


Automotive

CONTINENTAL / NISSAN
HONDA / KEEWAY
VOLKSWAGEN



Agrofood



Logistics center



GEFCO



DECATHLON



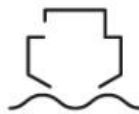


1. Why Barcelona?

Biggest industrial and logistics concentration in the Mediterranean and Southern Europe



21 days from China
 direct container services with the shortest transit time from Asia to Europe



Save between 10-15%
 in distribution costs



Save 15-20%
 on your carbon footprint



Market of **400 million consumers**
 in less than 48h



1. Why Barcelona?

Concentration of logistics facilities & services: airport, port, logistics areas, international logistics operators...

Warehousing

Fulfillment
Postponement
Repacking
Transformational Cross Docking
.....

Production services

Kitting
Light Assembly
Technical Services
.....

Distribution services

Aftermarket services



KUEHNE+NAGEL

Specialized by product segments



HUAWEI



SEAT

E-commerce

EDREAMS
LETS BONUS
PRIVALIA
PARABEBÉS



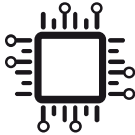
Fashion and footwear

ZARA
MANGO
DESIGUAL



Electronic products

FUJITSU / HAIER
HUAWEI / IBM
SIEMENS / SUNFOR



Industrial products and consumer durables

HAIER
SUNFOR



Chemicals

BAYER
HENKEL
BASF
SOLVAY
DOW



Automotive

CONTINENTAL /
HONDA / KEEWAY
VOLKSWAGEN

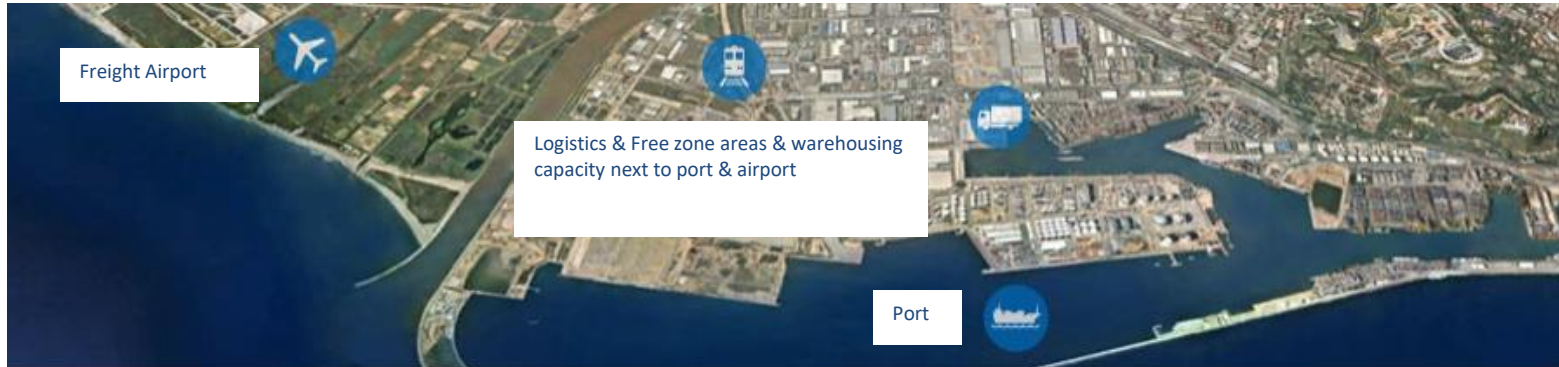




1. Why Barcelona?

Potential European market

Barcelona, an integrated logistics hub



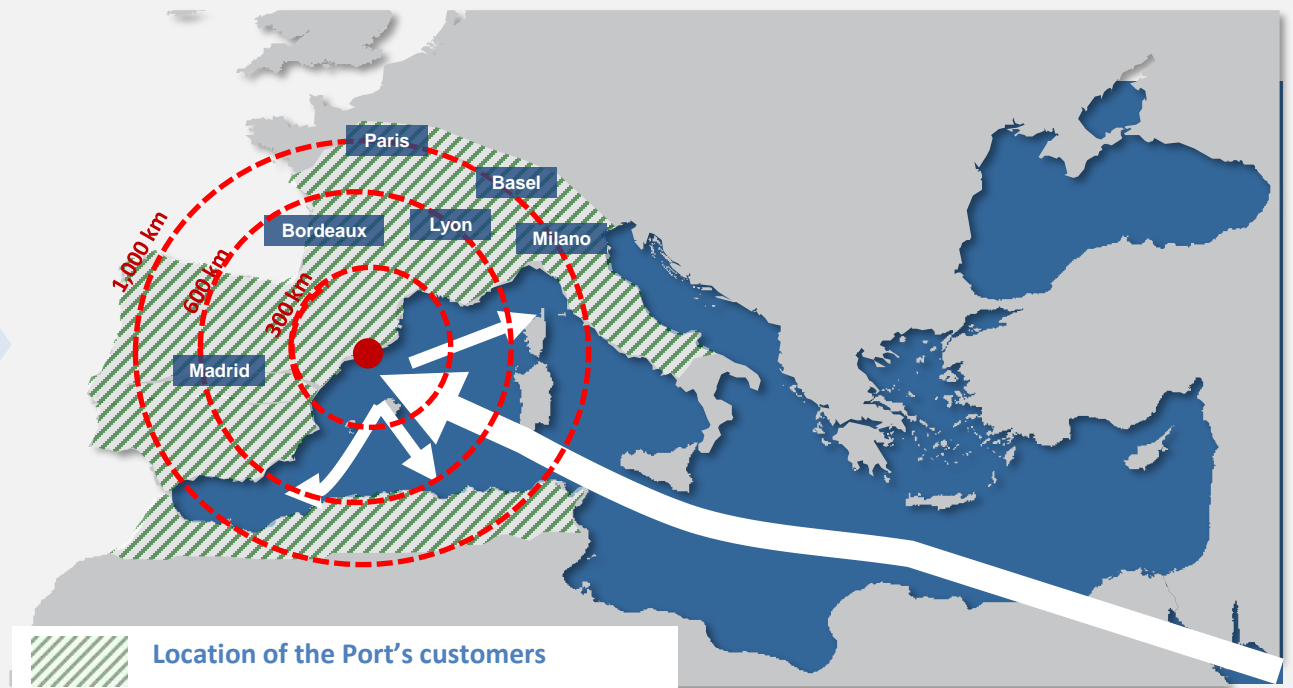
- **Only location in Southern Europe hosting, within in 5 kilometers, all together a port, airport, free zones and logistics areas** with warehousing capacity.
- **Strong synergies among all transport** modes for inbound and outbound flows and global distribution.
- A **unique integration of world-class infrastructures** (port, airport, free zone and logistics zone), **services** and **top commercial & logistics partners**.
- **Best integrated rail network for direct distribution to central Europe and mainland Spain.**
- **Shareholders in inland's maritime terminals network linked with the port.**



2. The Port of Barcelona

Strategy: the future of the Port

European & 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



Excellence in the provision of services

Largest part completed

New investments: Hutchison & Carnival, Grimaldi, Salamanca group...

Hinterland strategy

Direct services with Far East with excellent transit time

Port services

3rd most productive port in Europe JOC's Port Productivity Report 2014



3. Enlargement of the Port and Logistics areas

Specialized terminals for all types of cargo



Port de Barcelona: Solutions for all kind of traffic



3. The Port of Barcelona

A unique port due to its specialization in different traffics

	2020	2021	%	2019	2021	%
Total traffic	58.5 M tons	65 M Tons	11.3 %	65.8 M tons	65 M Tons	-1.1 %
Containers	2.9 M TEU	3.5 M TEU	19.3 %	3.3 M TEU	3.5 M TEU	6.2 %
Hinterland	1.79 M TEU	2 TEU	15.2 %	1.93 M TEU	2 TEU	6.6 %
Transshipment	1.2 M TEU	1.5 M TEU	25.5 %	1.4 M TEU	1.5 M TEU	5.7 %
Cars	480,337 Cars	499,011 Cars	3.9 %	777,690 Cars	499,011 Cars	-35.8 %
Bulk	58.4 M tons	65 M tons	11.3 %	65.7 M tons	65 M tons	-1.1 %
Liquid Bulk	12.8 M tons	12.4 M tons	-3.4 %	15.9 M tons	12.4 M tons	-22.4 %
Dry Bulk	4.0 M tons	4.5 M tons	9.9 %	4 M tons	4.5 M tons	10.5 %
Ro-Ro	347,093 UTI	396,730 UTI	14.3 %	410,546 UTI	396,730 UTI	-3.4 %
Cruises	198,842 pax	520,854 pax	161.9 %	3.1 M pax	520,854 pax	-83.4%





3. Enlargement of the Port and Logistics areas State-of-the-art infrastructures. HUTCHISON PORTS BEST



HUTCHISON PORTS BEST	
Capacity	2.75 M TEU
Area	79 ha
Berthing line	1,500 m
Draught	16.5 m
Quay cranes	13 (18)
Blocks	27 (40)
ASC	54 (80)
Shuttle carriers	32 (45)
Reach Stacker	8
Reefer plugs	2,750

Railway terminal
8 Rail tracks (750 m each) Total rail tracks of 21 km (Mixed gauge UIC-Iberian) 2 RMG

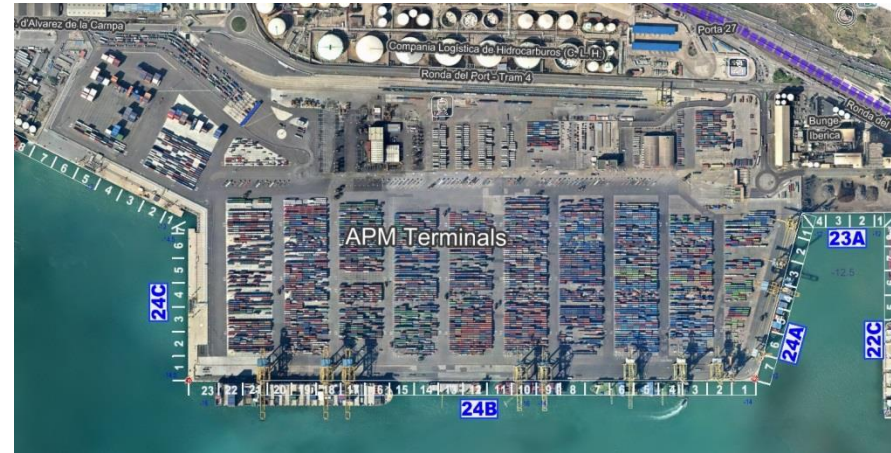
- Horizontal movements with non-automated Shuttle carrier
- Automated operations with ASC in the stockage area
- Land side operations with remote control



3. Enlargement of the Port and Logistics areas State-of-the-art infrastructures. APM Terminals Barcelona

APM TERMINALS BARCELONA	
Capacity	2.3 M TEU
Area	80,4 ha
Berthing line	1,515 ml
Draught	16 m
Quay cranes	14
Reach Staker	2
Fork lift	10
Straddle carrier	74
Reefer plugs	677

Railway terminal
6 Rail tracks (750mts each) (Mixed gauge UIC-Iberian) 2 RMG



- Online berthing windows booking system, avoiding vessel berthing delays
- Highest crane productivity per hour in the Mediterranean (average 35 moves per crane/hour)
- Automated gates
- Visual container inspection system (OCR), vessel to terminal and terminal to truck EIR, avoiding and reducing cargo and container claims to a minimum
- On dock rail facilities: daily services to Zaragoza, and other destinations



3. Enlargement of the Port and Logistics areas

ZAL



ZAL BCN ZAL PRAT ZAL

Surface (Ha)	65	143	208
Development area (m2)	265,000	580,000	845,000
Warehouses & offices (m2)	250,000	550,000	800,000
Services (m2)	14,000	32,000	46,000
Companies	100	120	220
Workers	5,000	8,000	13,000
Investment (thousand €)	55,000	235,000	290,000

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





4. Port network and Connectivity

Efficient maritime connections with foreland & Mediterranean

Weekly connections with all main world ports

Regular, frequent & direct services

Almost **100** regular shipping lines
Operated by **44** shipowners
connecting Barcelona with **190** ports

➤ **Main maritime routes from Barcelona**
(direct container services):

MAIN MARITIME ROUTES	Number of services from / to Barcelona
Europe – Far East	4
Europe – Indian Subcontinent	2
Europe – Middle East	4
Europe – Africa	26
Europe – North America	8
Europe – Central & South America	6
Mediterranean	37

➤ **Major shipowners partnerships:**

2M: MSC, Maersk (Hamburg Süd)

Ocean Alliance: CMA-CGM (APL), COSCO, Evergreen, OOCL,

THE Alliance: Hapag-Lloyd (UASC), Yang Ming, ONE Line & HMM



Network of maritime services in the Mediterranean

Short Sea Shipping & Ro-Ro & Multipurpose services

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



You can check updated services at:

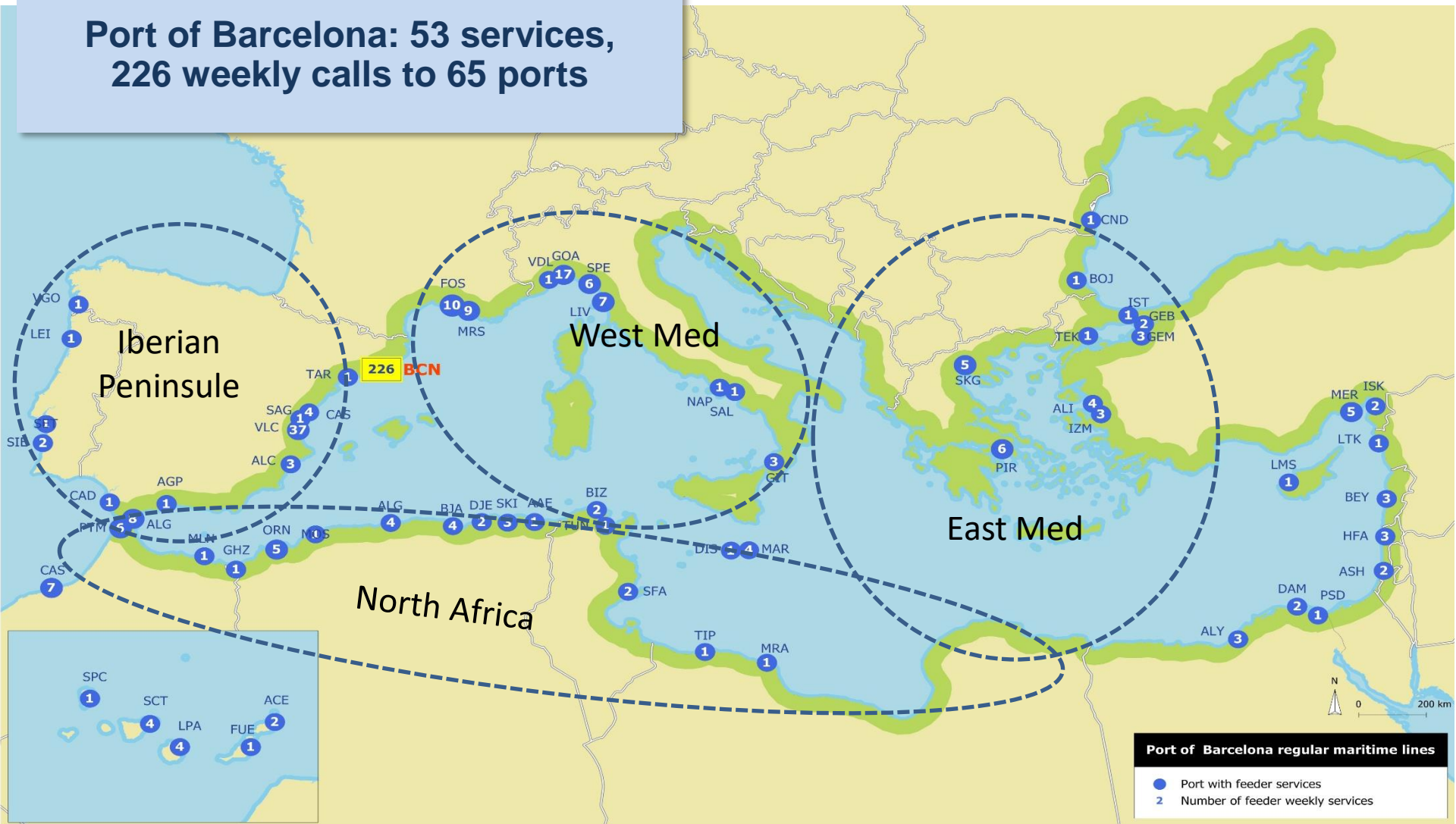
<http://www.portdebarcelona.cat/es/web/Port-dels-Negocis/lineas-regulares>



4. Port network and connectivity

Mediterranean hub: lines services and feeders

Port of Barcelona: 53 services, 226 weekly calls to 65 ports

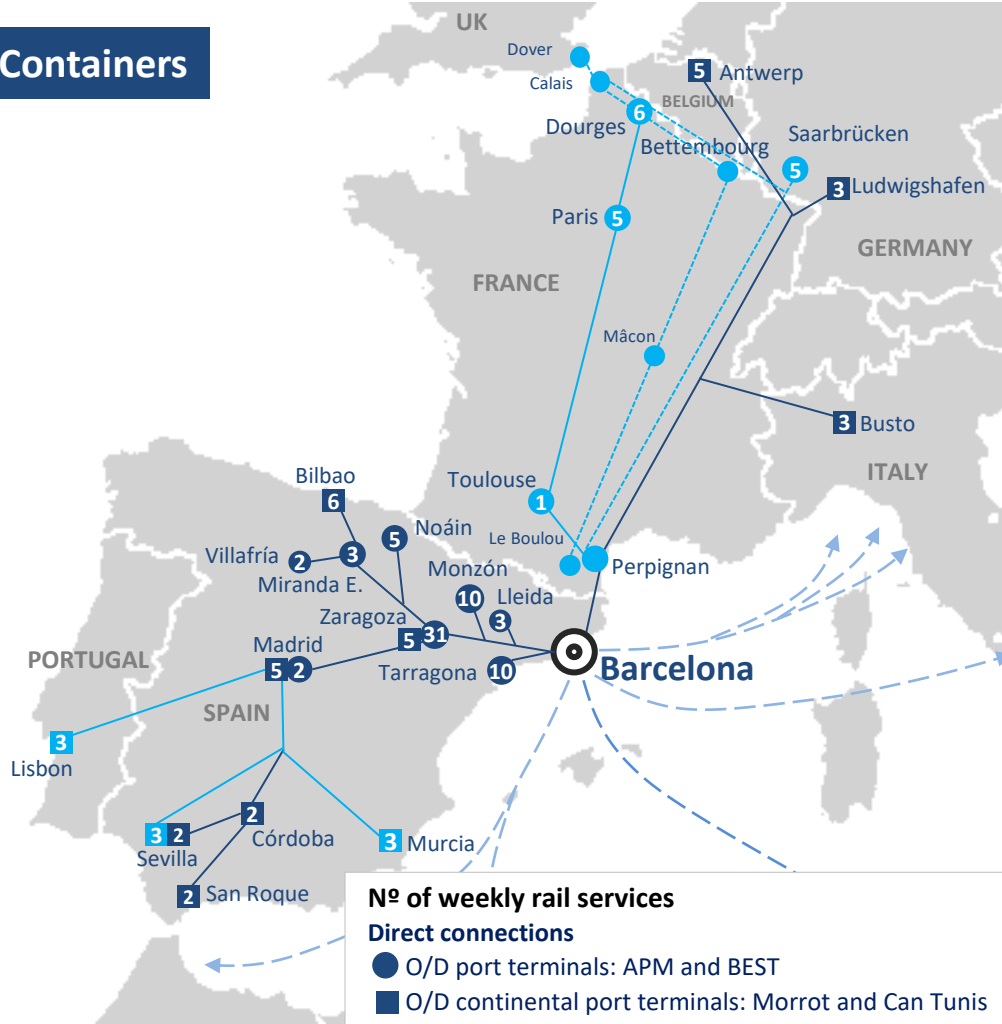




4. Port network and connectivity

Potential hinterland of Port de Barcelona

Containers



Nº of weekly rail services

Direct connections

● O/D port terminals: APM and BEST

■ O/D continental port terminals: Morrot and Can Tunis

Indirect connections

● Via Perpignan / Le Boulou

■ Via Madrid

Rail motorways: semitrailers & containers -----

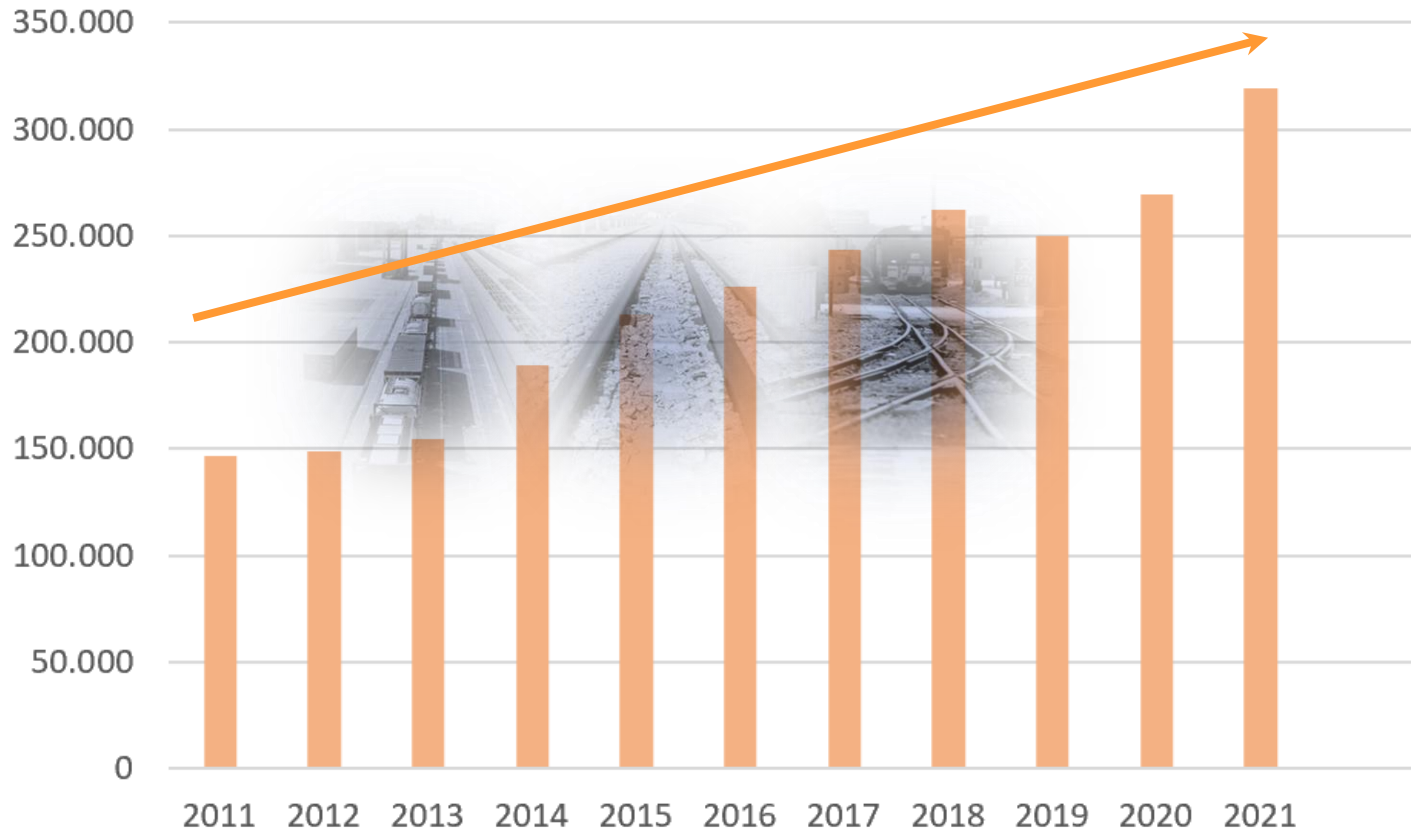
You can check updated services at:
www.portdebarcelona.cat/ssff

HINTERLAND	RAIL LOGISTICS OPERATORS	WEEKLY FREQUENCY
● From port terminals APM and BEST		
Lleida Pla Vilanoveta	APMT Railway	3
Madrid Azuqueca	APMT Railway (via TMZ)	2
Miranda de Ebro (Burgos)	Synergy	3
Monzón (Huesca)	APMT Railway MSC - reefer	6 4
Noáin (Pamplona)	Synergy	5
Tarragona	TP NOVA APMT Railway	5 5
Villafria (Burgos)	APMT Railway (via TMZ) 1 mixed dry cargo + reefer	2
Zaragoza TMZ	APMT Railway 1 daily reefer	25
Zaragoza PLAZA (Noatum rail terminal and LTA)	SICSA / APMT Railway	6
● Via Perpignan / Le Boulou Services offered by TP Nova (France), VIA (Bettembourg), DB Cargo (Saarbrücken), CargoBeamer (Calais) and other rail logistics operators		
■ From continental port terminal of Morrot		
Antwerp (Belgium)	HUPAC Containers & semitrailers	5
Busto (Italy)	HUPAC	3
Ludwigshafen (Germany)	KOMBIVERKHER	3
Córdoba, Sevilla, San Roque	MULTIRAIL	2
Bilbao	CONTINENTAL / SICSA	6
Zaragoza PLAZA and Madrid Abroñigal	RENFE	5
■ Via Madrid Abroñigal to Murcia, Sevilla and Lisbon	RENFE	5



4. Port network and connectivity

Railway traffic evolution in the Port of Barcelona



	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021
TEU's	146.685	148.926	154.522	189.553	213.026	225.996	243.605	262.379	249.751	269.304	318.971
TOTAL increase	41,20%	1,53%	3,76%	22,67%	12,38%	6,09%	7,79%	8,89%	-5,85%	7,83%	18,44% (vs. 2020) 27,71% (vs. 2019)
Railway share over	10.3	10.8	10.8	12.2	12.8	12.6	12.8	13.2	12.97	15.1	15.53



5. Client Oriented

Customer orientation: competitiveness/quality /productivity/efficiency

Providing comprehensive and specialized services to promote increased competitiveness and international projection of the companies of our country



Link between the market and the Port

It acts as a promotion, complaints handling, information requests, incidents resolution, etc,



Commitment of quality and service efficiency between companies and institutions involved on the maritime transport in the Port of Barcelona



It acts at APMT, BEST, the PIF, and Setram Autoterminal

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



MISIÓN EMPRESARIAL DEL PORT DE BARCELONA

Promotion to introduce and strengthen the presence of the companies of our country into the markets with more growth prospects through a customized agenda of business and institutional contacts,



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



Telematic tool and interconnection between ports, It provides information services, document exchange and electronic commerce,



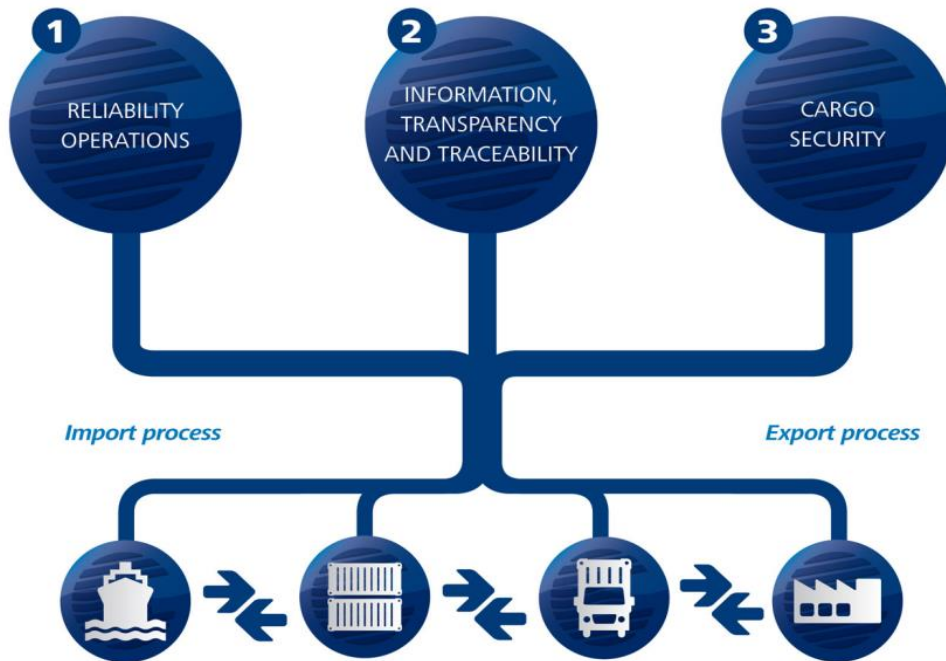
The Port offers **logistics consulting services** proposing alternatives for greater efficiency



5. Client Oriented Efficiency Network

Efficiency Network is a commitment to quality and efficiency of service between the companies and institutions involved in maritime transportation at Port de Barcelona.

91 Certified companies: Freight Forwarders, Shipowners, Transport companies, Terminals
Efficiency commitments



- Arrival or departure of container
- Loading and unloading
- Bill of lading procedures
- Customs clearance
- Freight inspections
- Container handling
- Border inspection post inspection and scanner
- Hazardous materials authorization
- Entering or leaving the port area
- Collection or delivery of goods
- Safety seal checking





6. Priority axis

Innovation and digital transformation

Smart Logistics



Trough technology and automation:

- makes the entire logistics chain more efficient, reliable, predictive and productive
- record and share information in real time with customers
- integrates physical and technological infrastructures.

Smart Mobility



- Local and international multimodal accessibility.
- All modes of transport
- Infrastructures and ICT
- Traffic management

...are efficient, integrated, sustainable, innovative and safe

Smart Environment



- Protects and is respectful with its surroundings
- Promotes measures to reduce pollution
- Makes efficient management of natural and energy resources
- It is sustainable from an energy point of view

Smart Economy



It is the economic engine of its area of influence and generator of public value

- Creates wealth
- Dynamize the labor market
- It facilitates the internationalization and competitiveness of its environment.
- Drives innovation and entrepreneurship

Smart People



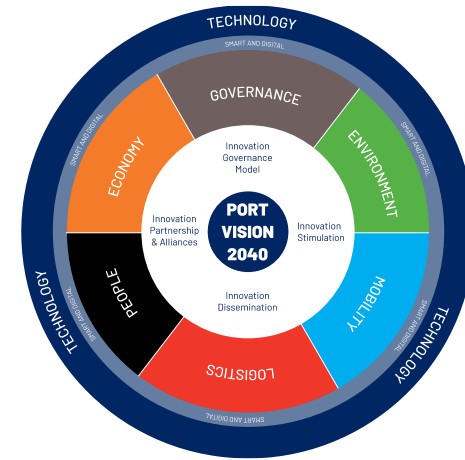
There is a good port-city integration that enhances ...

- the diversity
- learning, creativity and participation of people
- culture
- social cohesion
- the tourist attraction of its surroundings

Smart Governance



- Makes an efficient management of public resources
- It's transparent
- Encourages participation
- Guarantees physical and legal security for the benefit of the citizen and the economy ..





6. Priority axis Sustainability

Port Community Goal

Create Value

Economic
value

Social Value

Environmental
Value

Active contribution to **13** of the **17** United Nations Sustainable Development Goals (SDG).





6. Priority axis

Sustainability

Actions to improve the air quality: Port actions to reduce ship emissions

Reduction of ship emissions

LNG promotion as an alternative fuel

Cold ironing shore-to-ship

New environmental rebates scheme



6. Priority axis Sustainability

Actions to decarbonize port activity

The Port of Barcelona has signed the WPCAP

World Ports Climate Action Program

Leading world Ports take a strong role in Climate and Clean Air Action

The Paris Agreement makes a clear call to global society to significantly reduce anthropogenic greenhouse gas emissions to ensure that global warming will be limited to well below 2 degrees Celsius.

Greenhouse gas emissions from the maritime transport are very significant. Therefore, emission reduction efforts in maritime transport are essential. These efforts will also work to reduce air pollutants from shipping that are harmful to both human health and nature. Ports are critical nodes in the global maritime transportation network and are also the highly visible representative of maritime transport for their surrounding communities. Finally, Ports are at-risk from sea level rise and adverse weather conditions associated with climate change.

Therefore, as key economic and social drivers of both global and local developments, we declare today to take a leading role in addressing climate action.

Ports have a strong record of working collaboratively with industry to shape the future of maritime transport. While the challenge and responsibility ultimately rests with the maritime transport itself, the undersigned ports are committed to deliver on climate action and strive for the combination of clean air and climate actions.

Climate Action Program

As leading ports around the world, we can make a very significant impact on climate action and deliver on the call for clean air at the same time, through concerted, cooperative efforts. By "acting local and thinking global", we will start and accelerate cooperation through the following specific actions:

- 1) Increase efficiency of supply chains while approaching and while in Ports through development and harmonization of digital tools that increase transparency and optimize supply chain performance;
- 2) Advance common and ambitious (public) policy approaches on emission reductions within larger geographical areas, either through limits, direct or indirect pricing or other means, thereby neutralizing competitive distortion that could arise from non-participating ports accommodating the locally lowest environmental standard;
- 3) Accelerate development of feasible renewable power-2-ship solutions or other zero emission solutions controlling at-berth emissions for ships using conventional fossil fuels;
- 4) Accelerate in the supply chain development of commercially viable sustainable low-carbon fuels for maritime transport (with a greenhouse gas reduction potential well below 50% of the current fuels) and infrastructure for electrification of ship propulsion systems such as charging and/or battery exchanges. We support the role of LNG as transition fuel;
- 5) Accelerate our efforts to fully decarbonize the cargo-handling facilities in our ports;

Participating ports will join forces to deliver on each of the above by leading collaborative projects that result in measurable progress.

Call towards our stakeholders

The shipping industry has a responsibility to deliver on the Paris Agreement. Thus, any effort must include the private stakeholders who actually perform the goods movement services at and between each port. Therefore, we call upon the shipping industry to:

- a) Join us in our commitment to deliver on the Paris agreement;
- b) Work together with the undersigned ports and other stakeholders to ensure swift and coordinated action that deliver results.

While each port shall put forward their best effort towards reducing greenhouse gas emissions, no port has true authority to require changes in regular business practices under the law. Therefore, the undersigned ports do hereby call upon governments and regulators to:

- a) Work together with us to implement global or at least regional policies for greenhouse gas emission pricing (either directly or indirectly) and/or other policy approaches on emission reductions in ways and on scales that minimize competitive distortion;
- b) Provide financial support for research and development as well as pilot projects and implementation of low-carbon fuels and clean technologies for the maritime transport;
- c) Provide support, including by financial means, to ports to the World Ports Climate Action Program.

We will continue work collaboratively with the International Maritime Organization, sector representatives, governments, regulators and other stakeholders to develop short-, medium- and long-term actions to advance decarbonization of maritime transport. We will use the World Ports Sustainability Program to reach out and communicate results to the global port community and to amplify our voice on climate action.

Signed by:

<p>date: <u>18 Sept 2018</u></p>  Jacques Vandenberghe CEO Port of Antwerpen	<p>date: <u>18 Sept 2018</u></p>  Marc Ferrer President Port of Barcelona	<p>date: <u>18.09.18</u></p>  Hans Meier CEO Port of Hamburg	<p>date: <u>11/11/18</u></p>  Mario Collares Executive Director Port of Long Beach
<p>date: <u>13/09/2018</u></p>  Eugene D. Seroka Executive Director Port of Los Angeles	<p>date: <u>13/09/2018</u></p>  Alfred Castelain CEO Port of Rotterdam	<p>date: <u>Sept 25, 2018</u></p>  Robin Silvester President and CEO Vancouver Fraser Port Authority	



The Port of Barcelona leads one of the 5 Working groups: supply of electricity and zero-carbon fuels to ships from port



Port de Barcelona