

BUSINESS AREA 6



Logistics

According to the World Bank (WB), Spain ranks 17th in the international list for logistics performance and continues to position itself amongst the best countries in this area. At a European level, the Spanish logistics sector is fifth in international shipments, moving from position 20 to 5 in only two years mostly because of an improvement in infrastructure and international shipments according to the WB. A number of factors contribute to the excellent performance of this sector, including the strategic location of Spain as a link between Europe and Latin America, Northern Africa and the Middle East, as well as a first-class highway and freeway network and the active role of international transport stakeholders who are highly experienced and specialized. Furthermore, Spain is the European country with more kilometers of high-speed train lines and the second worldwide.

In the Region of Murcia, logistics accounts for 4% of the regional GDP (commerce excluded), that is 21.88% of the gross added value, 5.7% of job generation and, as a result of the pandemic and the significant growth of e-commerce, more than 25% of

employment. Murcia is a region located in a strategic axis for railway, sea and air connections, thus favoring logistical chain optimization through multimodal freight transport. It is important to note that the Region's chain optimization through multimodal freight transport. It is important to note that the Region's refrigerated truck fleet, the largest in Spain, specializes in fruit and vegetable transport, an industry supplying European markets on a daily basis. Within Spain, Murcia is the region with the highest ratio of transported metric tons per kilometer. As for the Port of Cartagena, second with the highest growth rate in Europe, it ranks first in liquid bulk cargo nationwide and fifth in freight transport.

Other factors allowing Murcia to be at the forefront of logistics are, on the one hand, cost effectiveness, competitive demand-adapted services and, on the other hand, industrial land availability in over 82 industrial parks where key logistics projects are developed at a national and European level. The Region's large industrial, agricultural and service production has always required having a quick, efficient distribution network. This has allowed

Murcian logistics sector agents to gain ample commercial experience and knowledge of this industry.

In addition to traditional logistics activities, in the last few years there has been an increased need for e-commerce storage and distribution, a booming industry over the last few years which is expected to further grow. This sector has brought new logistics surface demands, as well as the creation of specialized express carrier and parcel services. Furthermore, the spectacular growth of regional tourism has resulted in improved logistical support infrastructures.

In short, logistics and transport comprise a key sector for the Region, allowing Murcia to better position itself in today's globalized economy.

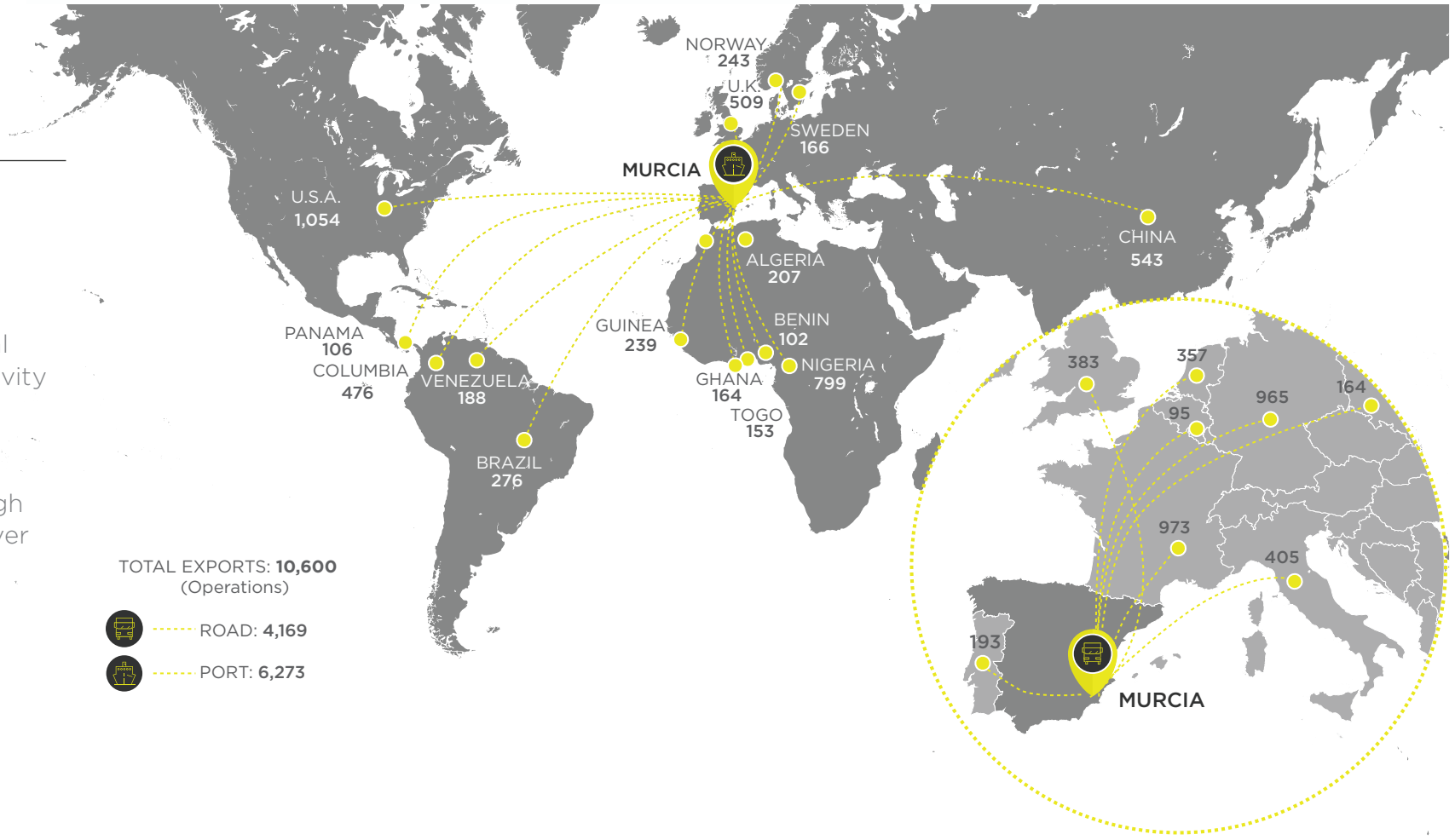


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The future multi-modal Areas of Logistics Activity (ZAL) in Murcia and Cartagena are a great business opportunity expected to attract high levels of investment over the next few years.



INDUSTRY HIGHLIGHTS

Due to its strategic location, it is no surprise that the main industry companies have chosen our Region to run their operations. Some of the main names are **Amazon**, which has here one of its 4 Robotics Fulfillment centers in Spain, **Panattoni**, which set up in Murcia its largest facility in Spain, as well as 5 new state-of-the-art logistics centers built by **Primafrio**, **Vidal**, **Consum**, **Lidl** and **El Mosca**.

In addition to them, the main players in the national and international industrial logistics market, such as **VGP** and **Prologis**, seek to consolidate their logistical infrastructures in our region. Other important companies which have been operating in this industry are **Smurfit Kappa**, **Alfil Logistics**, **Grupo Fuentes**, **Transportes Caliche**, **Grupo Disfrimur**, **Campillo Palmera**, to name a few.

The Region's ZAL are common interest projects, priority Trans-European transport network hubs and part of the Mediterranean Corridor.