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# Transporte XXI

December, 2024



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+34 950 21 20 20 info@jcarrion.es jcarrion.es Follow Jcarrion at LinkedIn

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# Transporte XXI

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INDUSTRIA Y COMUNICACIÓN SA

c. Nerbioi, 3 - 5 B  
48001 Bilbao (Spain)  
+34 944 400 000  
transporte@grupoxxi.com  
www.TransporteXXI.com

Founder

F. JAVIER MIRANDA RUIZ

Managing Director

JAVIER MIRANDA DESCALZO

Director

ALFONSO ALDAY

Deputy Director

ANTONIO MARTÍNEZ

Analysis and Editorial

CARLOS SÁNCHEZ,  
EVA MÁRMOL,  
IÑAKI EGUIA

Technical Director

JOSE ANGEL CALVO

Marketing Director

CLARA BOUZA

Graphics and Design

GEMA LAUZIRIKA,  
IBON UGARTEBURU

Research

TRANSPORTE XXI DOCUMENTATION  
DEPARTMENT

Production

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FRUIT AND VEGETABLE SECTOR | GLOBAL PRODUCTION

# PERFECT STORM

## CLIMATE CHANGE AND GEOPOLITICAL TENSIONS SLOW FRUIT AND VEGETABLE PRODUCTION GROWTH

The agri-food industry remains on an upward trajectory. However, growth has slowed due to geopolitical tensions, economic deceleration, and climate change. In the challenging year of 2022—marked by the onset of the war in Ukraine—global fruit and vegetable production exceeded 2.27 billion tons. This figure, the latest available from official data, represents a 1 percent increase over the previous year and stands 4 percent above pre-pandemic levels.

These insights are drawn from statistical data published by the Food and Agriculture Organization (FAO) of the United Nations, processed by Transporte XXI.

At the forefront of production, far ahead of its competitors, is China, often referred to as the “world’s orchard.” The Asian giant produced over 924

million tons of horticultural products, growing 2 percent compared to the previous year—double the global average growth rate. This output accounts for more than 40 percent of the world’s fruit and vegetable production. India follows with 271 million tons, marking a 4 percent increase from the previous year. Completing the top three is Brazil, with 70 million tons in 2022, a 2% rise from 2021. Together, these three countries control over half of the global production (55.7%).

Spain, despite a 14 percent drop in production, remains in the global Top 10, rounding out the list. This decline is largely due to adverse weather conditions and rising operational costs—a “perfect storm,” according to industry experts and analysts. Nonetheless,

## SPAIN LEADS EUROPE’S RANKINGS

Spain remains in the global Top 10, despite a sharp 14% drop in horticultural production, and continues to lead Europe’s rankings.

RK	COUNTRY	2022	%22/21	%22/19	2021	2020	2019
1	China	924,754	+2%	+4%	907,424	890,866	887,424
2	India	271,467	+4%	+9%	260,528	257,223	250,034
3	Brazil	70,104	+2%	0%	68,700	69,039	69,875
4	Türkiye	57,001	0%	+7%	57,118	54,574	53,064
5	U.S.A.	53,585	-6%	-14%	56,763	60,256	62,411
6	Mexico	49,632	+5%	+4%	47,278	47,926	47,693
7	Indonesia	41,054	+5%	+16%	38,971	38,405	35,544
8	Nigeria	37,219	+3%	+17%	36,287	34,289	31,740
9	Egypt	34,860	0%	0%	34,740	35,847	34,840
10	<b>Spain</b>	<b>33,935</b>	<b>-14%</b>	<b>-10%</b>	<b>39,279</b>	<b>38,836</b>	<b>37,587</b>
11	Vietnam	32,974	+4%	+14%	31,662	30,177	29,004
12	Italy	31,561	0%	+3%	31,473	31,617	30,586
13	Iran	30,760	-4%	-6%	31,926	31,788	32,578
14	Philippines	23,506	0%	0%	23,555	23,349	23,607
15	Russia	20,002	+2%	0%	19,632	19,858	20,096
16	Uzbekistan	17,641	+8%	+11%	16,352	15,964	15,938
17	Pakistan	17,353	-6%	+1%	18,384	17,926	17,195
18	Argelia	16,568	+4%	+4%	16,004	16,607	15,949
19	Colombia	15,999	0%	+8%	16,025	14,444	14,830
20	South Africa	14,929	+7%	+15%	13,891	13,095	12,954
	<b>TOTAL 20</b>	<b>1,794,903</b>	<b>+2%</b>	<b>+4%</b>	<b>1,765,992</b>	<b>1,742,088</b>	<b>1,722,950</b>
	<b>WORLD TOTAL</b>	<b>2,272,410</b>	<b>+1%</b>	<b>+4%</b>	<b>2,247,265</b>	<b>2,211,379</b>	<b>2,182,955</b>

Thousands of tonnes. Source: FAO.

Spain maintains its position as Europe’s leading fruit and vegetable producer, with nearly 34 million tons harvested. Compared to 2019, this represents a 10 percent decline.



FRUIT AND VEGETABLE SECTOR | INTERNATIONAL TRADE

# A TOUR AROUND THE WORLD

## FRUIT AND VEGETABLE TRADE CONTINUES ITS UPWARD TREND

The international trade of fruits and vegetables remains robust. It hasn't stopped, though growth has decelerated in tandem with production. In the challenging year of 2022—marked by Russia's invasion of Ukraine and soaring energy prices impacting consumption—global trade exceeded 536 million tons. This figure represents a 1 percent increase over the previous year, against a backdrop of rising maritime freight rates. Compared to pre-pandemic levels, trade has advanced by 4 percent, according to the latest statistics from the The Food and Agriculture Organization (FAO).

### TRADE ACCOUNTS FOR A QUARTER OF PRODUCTION

The report also underscores Spain's significance on the global stage. Despite declining trade volumes, Spain holds the fourth position worldwide, trailing behind the United States, China, and the Netherlands.

In 2022, Spanish imports and exports reached nearly 22 million tons, a 3 percent drop from the previous year. This decline prevented Spain from surpassing the Netherlands as Europe's top exporter—a position reinforced by the Netherlands' strategic ports acting as distribution hubs.

Furthermore, Spain slipped another rank, overtaken by China (see accompanying chart). Spanish exports totaled over 16 million tons, representing 73 percent of the nation's foreign trade. However, discrepancies exist between FAO statistics and data from other organizations, primarily due to variations in product classifications. For instance, according to Spain's Ministry of Industry, Trade, and Tourism, fruit and vegetable exports amounted to 13.2 million tons in 2022—almost 3 million tons less than FAO figures.

### Global Trade Rankings

Combining imports and exports, the United States leads the global rankings with a trade volume of 48 million tons—nearly 14 million tons more than Spain's total. This figure marks a 3 percent increase compared to 2021.

China follows with 40.3 million tons of fruit and vegetable trade, reflecting a 7 percent rise from 2021 and a 21 percent surge compared to 2019.

The Netherlands rounds out the top three with 31.6 million tons, a 1 percent increase from 2021 and 5 percent above 2019 levels.

## SPAIN SLIPS FURTHER FROM THE TOP THREE

Spain maintains its prominence in global horticultural trade, solidifying its fourth-place position, though the gap with the Netherlands continues to widen.

RK	COUNTRY	2022	%22/21	%22/19	2021	2020	2019
1	U.S.A.	48,336	+3%	+8%	47,036	44,906	44,725
2	China	40,353	+7%	+21%	37,644	35,695	33,334
3	Netherlands	31,590	+1%	+5%	31,189	29,613	30,226
4	Spain	21,987	-3%	-4%	22,755	22,572	22,960
5	Thailand	20,788	+12%	+55%	18,587	15,062	13,409
6	Germany	20,511	-4%	-3%	21,397	21,575	21,076
7	Belgium	19,650	+1%	+3%	19,416	19,630	19,159
8	France	17,128	+5%	+4%	16,286	16,062	16,468
9	Mexico	15,953	-0%	+6%	15,983	14,841	15,081
10	Canada	15,384	-3%	-6%	15,910	17,665	16,414
11	Italy	13,264	+2%	+2%	13,011	12,968	12,992
12	India	12,010	+12%	+19%	10,688	9,739	10,058
13	United Kingdom	11,268	+7%	-4%	10,506	12,171	11,734
14	Türkiye	10,671	+2%	+20%	10,426	9,282	8,917
15	Russia	10,401	-8%	-9%	11,319	10,813	11,426
16	Vietnam	10,199	-5%	+12%	10,778	8,783	9,138
17	Poland	8,418	+1%	+4%	8,335	7,684	8,098
18	Ecuador	7,972	+2%	+5%	7,820	8,043	7,581
19	United Arab Emirates	7,716	+15%	+29%	6,703	6,254	5,970
20	Egypt	7,542	+22%	+13%	6,171	5,938	6,684
<b>TOTAL 20</b>		<b>351,142</b>	<b>+3%</b>	<b>+8%</b>	<b>341,960</b>	<b>329,295</b>	<b>325,451</b>
<b>WORLD TOTAL</b>		<b>536,408</b>	<b>+1%</b>	<b>+7%</b>	<b>529,051</b>	<b>510,070</b>	<b>503,248</b>

Thousands of tonnes. Source: FAO.

## SPAIN: ONCE A GLOBAL EXPORT LEADER

Once the world's top exporter, Spain has now slipped to fourth place, overtaken by China, while the United States remains the largest buyer of horticultural products.

### TOP EXPORTERS

RK	COUNTRY	2022	%22/21	%22/19	2021	2020	2019
1	Netherlands	18,155	+3%	+5%	17,697	16,807	17,289
2	China	16,918	+3%	+0%	16,475	17,420	16,851
3	Spain	16,120	-6%	-8%	17,224	17,052	17,490
4	Thailand	14,410	+6%	+59%	13,614	9,581	9,066
5	Mexico	14,038	+1%	+9%	13,935	12,957	12,889
<b>WORLD TOTAL</b>		<b>268,621</b>	<b>+1%</b>	<b>+9%</b>	<b>265,023</b>	<b>249,782</b>	<b>247,261</b>

### TOP IMPORTERS

RK	COUNTRY	2022	%22/21	%22/19	2021	2020	2019
1	U.S.A.	36,019	+7%	+13%	33,811	30,791	31,763
2	China	23,435	+11%	+49%	21,170	17,373	15,766
3	Germany	14,529	-5%	-4%	15,357	15,529	15,191
4	Netherlands	13,435	-0%	+5%	13,493	12,658	12,799
5	France	10,323	+1%	+0%	10,253	9,932	10,298
<b>WORLD TOTAL</b>		<b>267,787</b>	<b>+3%</b>	<b>+10%</b>	<b>260,432</b>	<b>245,163</b>	<b>243,719</b>

Thousands of tonnes. Source: FAO.



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**FRUIT AND VEGETABLE SECTOR | SPANISH FOREIGN TRADE**

# FROM THE FARM TO EUROPE

THE EU ACCOUNTS FOR 83% OF SPAIN'S FRUIT AND VEGETABLE EXPORTS

Spain, once the world's leading exporter of fruits and vegetables —now ranked third behind the Netherlands and China— has managed to return to growth in 2024, despite ongoing challenges such as unfavorable weather, geopolitical tensions, and rising production costs.

Exports and imports to the European Union, which accounts for 70.5 percent of Spain's foreign trade in fruits and vegetables, rose by 7.3 percent in the first four months of 2024, reaching nearly 5 million tons. These figures come from the Ministry of Industry, Trade, and Tourism.

## IMPORTS AND EXPORTS TO THE EU BACK ON TRACK IN 2024

This positive start to 2024 signals a recovery in trade with the EU, following a 3 percent drop in 2023. In that year, an increase in imports (+3%) failed to offset the decline in exports (-4.4%).

“The decline in fresh fruit and vegetable export volumes in 2023 was due to multiple

### MEDITERRANEAN DOMINANCE

Exports from Andalusia, Valencia, Murcia, and Catalonia make up 89% of Spain's total, surpassing 10 million tons.

COMMUNITY	SHARE	2023	%23/22	%23/19	2022	2021	2020	2019
Andalusia	33%	3,725	-9%	-18%	4,095	4,408	4,486	4,568
Valencian Cmty.	28%	3,232	-8%	-22%	3,504	3,765	3,896	4,117
Murcia	19%	2,163	-6%	-17%	2,297	2,595	2,622	2,611
Cataluña	8%	954	+6%	-7%	897	1,018	982	1,022
Castilla-La Mancha	2%	218	-19%	+2%	268	222	182	214
Castilla-León	2%	203	+25%	+38%	163	175	158	147
Aragon	2%	188	+58%	-14%	119	156	176	217
Madrid	2%	179	-7%	-31%	192	231	255	260
Extremadura	1%	137	-16%	-17%	162	159	136	164
Galicia	1%	100	+27%	-3%	78	98	96	103
Navarre	1%	64	-7%	+8%	69	83	69	59
Basque Country	0%	54	-37%	+390%	85	39	8	11
Canary Islands	0%	19	-41%	-71%	32	35	54	66
La Rioja	0%	12	+154%	+30%	5	8	8	9
Balearic Islands	0%	11	-11%	-45%	12	16	18	20
Asturias	0%	0	0%	+62%	0	1	0	0
Cantabria	0%	0	-82%	+90%	0	0	0	0
Rest	1%	111	+98%	+164%	56	44	38	42
<b>TOTAL</b>	<b>100%</b>	<b>11,367</b>	<b>-6%</b>	<b>-17%</b>	<b>12,035</b>	<b>13,053</b>	<b>13,184</b>	<b>13,630</b>

Data in thousands of tonnes. Source: Fepex.

factors, including adverse weather conditions —particularly drought and water shortages— as well as rising production costs and decreased competitiveness against third countries,” according to FEPEX (the Spanish Federation of Associations of Producers of Fruits and Vegetables).

### Sharp Decline in Fruit Exports

The drop in exports to the EU in 2023 was particularly severe for fruits, which fell by 5.6% compared to 2022, totaling 5.5 million tons. Vegetable exports also declined by 3% to 4.8 million tons.

### EU: Spain's Primary Market

The EU was the destination for 83% of Spain's fruit and vegetable exports in 2023, amounting to 10.3 million tons. When including non-EU countries such as the UK, Switzerland, and Norway, this figure rises to 97%. According to FEPEX, this highlights Spain's limited presence in non-European markets. The association attributes this to the “difficulty in accessing non-EU markets, which depends on negotiating specific protocols that can take between two and five years.” This challenge contrasts with the “ease with which third-country products access the EU,” FEPEX warns.

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**Algeciras**  
E Algeciras@sharelogistics.com

**Valencia**  
E Valencia@sharelogistics.com

[www.sharelogistics.com](http://www.sharelogistics.com)



Spanish imports from the EU continued their upward trend, increasing by 3% to 2.4 million tons.

**Leading Export Regions**

Andalusia, Valencia, and Murcia remain Spain's top exporting regions. Andalusia leads with 3.7 million tons —representing 33% of national exports— though this figure is 9 lower than in 2022. The Valencia region follows with 3.2 million tons (-8%), and Murcia with 2.1 million tons (-6%). Catalonia ranks fourth with 897,144 tons, marking a 6 percent increase.

**Europe: Key Destination for Spanish Exports**

Europe accounted for 96% of total exports, with the EU leading at 10.3 million tons (83%). The UK followed with 1.3 million tons, an 11.8% decline. Exports to non-European markets fell sharply by 32% compared to 2022, totaling approximately 418,000 tons.

**ANDALUSIA LEADS IN EXPORTS OF FRUIT AND VEGETABLE PRODUCTS**

**SPAIN'S TRADE WITH FRANCE AND GERMANY**

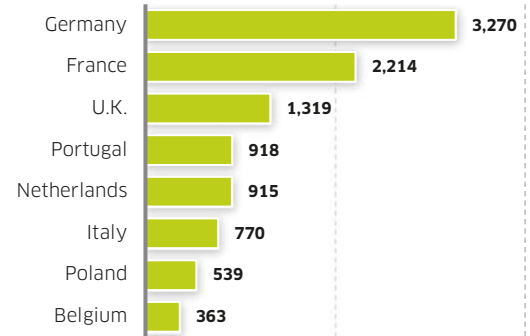
Fruit and vegetable flows with these two countries exceeded 6.6 million tons, representing 37% of Spain's horticultural exports.

**TOP 25 TRADING PARTNERS**

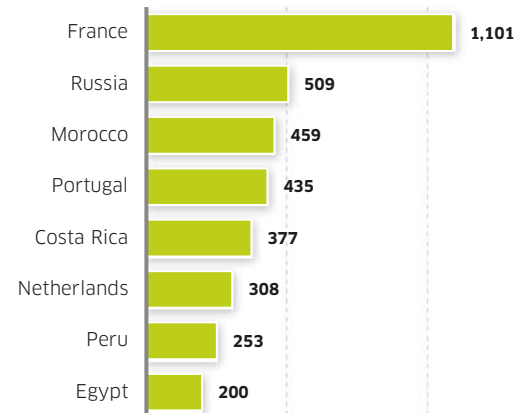
RK	COUNTRY	2023	%23/22	%23/19	2022	2021	2019
1	France	3,315	-8%	-7%	3,594	3,574	3,559
2	Germany	3,308	-2%	-13%	3,363	3,714	3,794
3	United Kingdom	1,369	-13%	-25%	1,568	1,679	1,831
4	Portugal	1,352	+7%	15%	1,264	1,246	1,179
5	Netherlands	1,223	-4%	-10%	1,268	1,272	1,356
6	Italy	942	-2%	-17%	957	1,067	1,136
7	Poland	596	-3%	-19%	613	704	734
8	Morocco	561	-18%	0%	680	614	561
9	Belgium	547	+1%	+2%	541	546	537
10	Russia	509	>999%	>999%	37	87	22
11	Costa Rica	381	+14%	+41%	333	337	270
12	Peru	253	+10%	+76%	229	212	144
13	U.S.A.	246	-5%	-10%	258	254	274
14	Sweden	227	-15%	-23%	268	298	294
15	Czech Republic	226	-3%	-3%	233	254	233
16	Brazil	215	+12%	-15%	192	208	252
17	Egypt	203	+572%	+653%	30	75	27
18	Switzerland	185	+4%	-5%	177	202	194
19	Denmark	160	-9%	-20%	176	195	201
20	Austria	144	-10%	-27%	160	182	197
21	Colombia	128	+38%	+8%	93	99	119
22	South Africa	120	+32%	+124%	91	90	54
23	Norway	115	+1%	+5%	113	122	109
24	Canada	104	+4%	-16%	100	95	124
25	Ireland	103	-5%	+5%	108	109	98
<b>WORLD TOTAL</b>		<b>18,094</b>	<b>+0%</b>	<b>-6%</b>	<b>18,024</b>	<b>18,812</b>	<b>19,187</b>

Thousands of tonnes. Source: Secretaría de Estado de Comercio.

**SPANISH EXPORTS**



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## FRUIT AND VEGETABLE SECTOR | SPANISH FOREIGN TRADE FLOWS

## SPANISH MARITIME TRADE BY REGION

	* %24/23	2023	%23/22	2022	2021	SHARE 2023	2019
Europe **	+7%	14,454	-4%	15,049	15,838	79.9%	84.5%
Latin America and Caribbean	+3%	1,260	+12%	1,121	1,083	7.0%	5.5%
Africa	+15%	1,127	+8%	1,041	991	6.2%	4.4%
CIS - Commonwealth of Independent States	-74%	527	+820%	57	126	2.9%	0.8%
North America	-0%	396	+0%	396	416	2.2%	2.4%
Asia **	+74%	153	+16%	132	120	0.8%	1.0%
Middle East	-13%	113	-28%	156	156	0.6%	1.0%
Oceania	+30%	63	-11%	71	81	0.3%	0.4%
Other	+77%	1	-6%	2	1	0.0%	0.0%
<b>TOTAL</b>	<b>+6%</b>	<b>18,094</b>	<b>+0%</b>	<b>18,024</b>	<b>18,812</b>		

## EUROPE \*\*

## EXPORTS

	* %24/23	2023	%23/19
Citrus fruits	+3%	2,899	-23%
Other fresh vegetables	+9%	1,656	-5%
Melons, watermelons and papayas	+2%	1,007	-27%
Apricots, cherries, plums...	+39%	793	-20%
Lettuce, endives, chicory...	+2%	781	-5%
Other	+11%	4,813	-10%
<b>TOTAL</b>	<b>+8%</b>	<b>11,947</b>	<b>-15%</b>

## IMPORTS

	* %24/23	2023	%23/19
Potatoes	+5%	1,003	+25%
Apples, pears and quinces	-11%	281	+8%
Cooked or frozen vegetables	-22%	241	+19%
Tomatoes	-2%	130	-0%
Other fresh fruits	-5%	125	+37%
Other	+17%	726	+8%
<b>TOTAL</b>	<b>+2%</b>	<b>2,507</b>	<b>+16%</b>

## NORTH AMERICA

## EXPORTS

	* %24/23	2023	%23/19
Cooked or frozen vegetables	+17%	52	+6%
Citrus fruits	+13%	37	-50%
Onions, garlic, leeks...	-24%	22	-2%
Temporarily preserved vegetables	-60%	12	-1%
Apricots, cherries, plums...	+224%	5	+14%
Other	+38%	16	-60%
<b>TOTAL</b>	<b>+1%</b>	<b>144</b>	<b>-28%</b>

## IMPORTS

	* %24/23	2023	%23/19
Dry vine vegetables	+0%	114	+9%
Other nuts	+11%	112	-6%
Dates, figs, pineapples, avocado...	-77%	11	-61%
Onions, garlic, leeks...	-68%	7	+305%
Other fresh vegetables	+2%	3	+79%
Other	+66%	5	-62%
<b>TOTAL</b>	<b>-1%</b>	<b>252</b>	<b>-6%</b>

## AFRICA

## EXPORTS

	* %24/23	2023	%23/19
Apples, pears and quinces	+1%	43	-36%
Dates, figs, pineapples, avocado...	+16%	19	+39%
Other fresh fruits	+3%	17	+38%
Onions, garlic, leeks...	-22%	17	-13%
Bananas	+36%	10	+642%
Other	+13%	30	-57%
<b>TOTAL</b>	<b>+4%</b>	<b>136</b>	<b>-26%</b>

## IMPORTS

	* %24/23	2023	%23/19
Citrus fruits	-3%	228	+256%
Melons, watermelons and papayas	-7%	142	+63%
Bananas	+7%	114	+31%
Other fresh vegetables	+31%	107	+19%
Other fresh fruits	+6%	71	+18%
Other	+35%	329	+18%
<b>TOTAL</b>	<b>+16%</b>	<b>991</b>	<b>+49%</b>

## LATIN AMERICA AND CARIBBEAN

## EXPORTS

	* %24/23	2023	%23/19
Apples, pears and quinces	+17%	25	-1%
Apricots, cherries, plums...	>999%	24	-27%
Citrus fruits	+24%	22	-37%
Cooked or frozen vegetables	-10%	18	+67%
Onions, garlic, leeks...	-31%	8	-80%
Other	+14%	9	-17%
<b>TOTAL</b>	<b>+13%</b>	<b>106</b>	<b>-32%</b>

## IMPORTS

	* %24/23	2023	%23/19
Dates, figs, pineapples, avocado...	-2%	424	+51%
Bananas	+2%	355	+40%
Melons, watermelons and papayas	+16%	80	-5%
Onions, garlic, leeks...	+7%	63	+26%
Citrus fruits	-46%	52	+18%
Other	+4%	173	+12%
<b>TOTAL</b>	<b>+3%</b>	<b>1,154</b>	<b>+27%</b>

## COMMONWEALTH OF IND. STATES

EXPORTS	*%24/23	2023	%23/19
Other fresh fruits	+622%	4	-26%
Citrus fruits	+97%	4	-59%
Apricots, cherries, plums...	+55%	1	-29%
Other fresh vegetables	+28%	1	-54%
Temporarily preserved vegetables	>999%	1	+381%
Other	+101%	2	+2%
<b>TOTAL</b>	<b>+113%</b>	<b>13</b>	<b>-38%</b>

IMPORTS	*%24/23	2023	%23/19
Dry vine vegetables	-82%	511	+297%
Fruit and nuts	+97%	1	-
Other nuts	-28%	1	-13%
Temporarily preserved vegetables	-83%	0	+28%
Grapes, including raisins	+861%	0	+33%
Other	+234%	1	+229%
<b>TOTAL</b>	<b>-81%</b>	<b>514</b>	<b>+294%</b>

## SPANISH MARITIME TRADE BY PRODUCT

	*%24/23	2023	%23/22	2022	2021	SHARE 2023	2019
Citrus fruits	+2%	3,341	-12%	3,814	3,838	18,5%	22,1%
Other fresh vegetables	+11%	1,855	-2%	1,889	2,049	10,3%	10,0%
Potatoes	+11%	1,482	+3%	1,443	1,232	8,2%	6,0%
Melons, watermelons and papayas	+1%	1,241	-2%	1,265	1,544	6,9%	8,1%
Other fresh fruits	+9%	883	-2%	902	1,000	4,9%	5,0%
Apricots, cherries, plums...	+37%	857	+13%	760	909	4,7%	5,6%
Other cooked or frozen fruits	+11%	819	+215%	260	300	4,5%	2,2%
Dry vine vegetables	-7%	817	-3%	-9%	-16%	4,6%	5,1%
Lettuce, endives, chicory...	-2%	811	-1%	821	893	4,5%	4,5%
Dates, figs, pineapples, avocado...	+4%	752	+6%	712	724	4,2%	3,1%
Tomatoes	+15%	748	-9%	820	839	4,1%	5,1%
Cucumbers and gherkins	+2%	684	-4%	711	672	3,8%	3,7%
Onions, garlic, leeks...	+1%	658	+3%	640	688	3,6%	3,8%
Bananas	+1%	616	+16%	530	543	3,4%	2,6%
Apples, pears and quinces	-6%	514	+1%	509	530	2,8%	2,9%
Cabbages, cauliflowers, swedes...	+9%	501	-5%	526	541	2,8%	2,7%
Other nuts	+9%	317	-8%	346	356	1,8%	1,6%
Grapes, including raisins	+2%	213	-21%	271	284	1,2%	1,2%
Other	+13%	949	+5%	905	959	5,2%	5,2%
<b>TOTAL</b>	<b>+6%</b>	<b>18,094</b>	<b>+0%</b>	<b>18,024</b>	<b>18,812</b>		

## OCEANIA

EXPORTS	*%24/23	2023	%23/19
Cooked or frozen vegetables	+72%	3	-27%
Onions, garlic, leeks...	-69%	1	-47%
Other nuts	-	0	-65%
Cassava roots and sweet potatoes	+201%	0	+6%
Dry vegetables	-41%	0	+372%
Other	+18%	0	-89%
<b>TOTAL</b>	<b>+65%</b>	<b>4</b>	<b>-44%</b>

IMPORTS	*%24/23	2023	%23/19
Other fresh fruits	+110%	39	-19%
Other nuts	-52%	11	+156%
Onions, garlic, leeks...	-12%	7	+27%
Dry vine vegetables	-30%	2	+90%
Apples, pears and quinces	-58%	1	-46%
Other	+978%	0	-93%
<b>TOTAL</b>	<b>+27%</b>	<b>59</b>	<b>-3%</b>

## ASIA \*\*

EXPORTS	*%24/23	2023	%23/19
Citrus fruits	-22%	6	-88%
Cooked or frozen vegetables	-13%	4	-26%
Other nuts	+61%	3	+75%
Apricots, cherries, plums...	-9%	3	-44%
Other fresh fruits	-40%	2	-56%
Other	>999%	7	-68%
<b>TOTAL</b>	<b>+273%</b>	<b>25</b>	<b>-72%</b>

IMPORTS	*%24/23	2023	%23/19
Temporarily preserved vegetables	+6%	27	+45%
Cooked or frozen vegetables	+72%	25	+111%
Coconut, nuts...	+8%	23	+15%
Onions, garlic, leeks...	-5%	10	+224%
Grapes, including raisins	+67%	9	-31%
Other	+12%	34	+26%
<b>TOTAL</b>	<b>+24%</b>	<b>128</b>	<b>+36%</b>

## MIDDLE EAST

EXPORTS	*%24/23	2023	%23/19
Citrus fruits	+8%	17	-69%
Manzanas, peras y membrillos	-11%	10	-69%
Other cooked or frozen fruits	+24%	10	-42%
Other fresh fruits	+56%	7	-38%
Onions, garlic, leeks...	-26%	6	-72%
Other	-31%	11	-73%
<b>TOTAL</b>	<b>+5%</b>	<b>59</b>	<b>-66%</b>

IMPORTS	*%24/23	2023	%23/19
Potatoes	-19%	37	+437%
Carrots, parsnips, radishes...	-88%	7	+974%
Dates, figs, pineapples, avocado...	+138%	4	+23%
Temporarily preserved vegetables	+22%	3	+460%
Citrus fruits	-69%	2	+36%
Other	-53%	1	+68%
<b>TOTAL</b>	<b>-24%</b>	<b>53</b>	<b>+312%</b>

(\*\*) From Asia and Europe, the countries included in the CIS and the Middle East have been removed. Tráfico in thousands of tonnes. Source: Agencia Tributaria. Compilation: Transporte XXI.

SURVEY | COLD LOGISTICS CHAIN

# ON THE ROAD TO DIGITALIZATION

THE INDUSTRY BETS ON PROCESS AUTOMATION TO BOOST COLD CHAIN EFFICIENCY

Freight carriers and 3PLs surveyed by Transporte XXI agree on one thing: digitalization is transforming cold chain logistics, “improving efficiency”. However, they emphasize the significant investment required and the challenges of cybersecurity as key hurdles. In terms of sustainability, these sector representatives highlight the role of renewable biofuels in advancing the EU’s ambitious “green” agenda, while acknowledging that electromobility “is not yet a viable option for long-haul transport.”

## ► IS BRUSSELS RIGHT TO PROMOTE RENEWABLE BIOFUELS FOR HARD-TO-ELECTRIFY SECTORS LIKE INTERNATIONAL ROAD TRANSPORT?

**Alex de Vaan** / Grupo Caliche

For international transport, the electric alternative is currently unrealistic. Electric trucks are expensive and not yet produced at scale, but the biggest challenge remains battery autonomy and the lack of charging infrastructure on European roads. This won’t be solved in just a few years. Therefore, any support for alternative solutions like renewable biofuels—or even hydrogen—will be welcome. The key lies with European authorities in Brussels. Only through a transparent and unified policy across the 27 EU countries can we achieve significant CO<sub>2</sub> reductions.

**Ángel González** / Ontime

Anyone familiar with business projects and transformations knows that decarbonization requires short, medium, and long-term measures. Yet policymakers seem to focus solely on the endgame of electric and hydrogen solutions.

In the meantime, Ontime has reduced its carbon footprint by 35% over the last six years, thanks to more efficient diesel engines, better transport efficiency, and the adoption of gas and HVO (hydrotreated vegetable oil). This equates to thousands of tons of CO<sub>2</sub> kept out of the atmosphere. Why bet everything on the ‘final miracle’ when we can make progress along the way?

**Javier Jiménez** / Molinero Logística

And our question would be: Who is

**ALEX DE VAAN**

Director of Business Expansion  
Grupo Caliche



**“RIGHT NOW, THE ‘ELECTRIC’ ALTERNATIVE IS NOT AN OPTION”**



APM TERMINALS BARCELONA

going to pay for this? Because the cost is 0.30 cents more per litre.

**José Esteban Conesa** / Primafrío

At Primafrío, we recognize the need to decarbonize road transport by combining the current available options. While electric trucks work well for short distances and last-mile deliveries, they are not viable for long-haul routes due

to high costs, limited range, and insufficient charging infrastructure.

Renewable biofuels like HVO and biomethane offer a practical alternative. They provide sufficient range without a significant increase in vehicle acquisition costs and can use the existing fuel station network. We are actively involved in high-level EU research projects like Longrun, Zefes, and

Escalate to develop solutions for major transport corridors.”

**Vincent Duranton** / ID Logistics Iberia

Brussels should indeed promote renewable biofuels for road transport. These fuels offer a viable and sustainable alternative to traditional fossil fuels, significantly reducing greenhouse gas emissions and supporting EU climate goals.

At ID Logistics, we have already adopted renewable HVO biofuel for

**> HOW WILL THE IMPLEMENTATION OF 44-TON TRUCKS AND EURO-MODULAR VEHICLES IMPACT COLD CHAIN LOGISTICS IN SPAIN?**

**Alex de Vaan**

This change will simplify cross-border transport and support the transition to sustainable logistics. In cold chain logistics, the main benefit will be with euro-modular vehicles: while many temperature-controlled goods are not particularly heavy, they can be trans-



many of our operations.

Encouraging the use of biofuels can also drive technological innovation, infrastructure investment, and economic growth. However, it's essential that these initiatives come with policies ensuring sustainable production and safeguarding biodiversity and food security.”

ported in higher volumes, reducing costs and CO emissions per unit transported.

**Ángel González**

We've advocated for 44-ton and 25.25-meter euro-modular trucks since 2005. These vehicles offer:

1. Safety: No impact on small transport operators' role in the sector.

**ÁNGEL GONZÁLEZ**

General Manager  
Ontime



**“WE NEED TO TAKE MEASURES IN THE SHORT, MEDIUM, AND LONG TERM”**

**JOSÉ ESTEBAN CONESA**

President  
Grupo Primafrio



**“THE 44-TON LIMIT DOES NOT ALIGN WITH THE INTERESTS OF ROAD TRANSPORT”**

2. Environmental Benefits: Reduced CO emissions.

3. Economic Gains: Lower total costs allow for more equitable profit margins.

**Javier Jiménez**

Implementing 44-ton trucks will help make our clients more competitive. However, they need to understand that it comes with higher diesel costs, which they will have to cover. Additionally, euro-modular vehicles require a much greater investment.

**José Esteban Conesa**

We do not support this measure. It raises safety concerns, increases fuel consumption, and adds maintenance costs. Road infrastructure will suffer greater wear, impacting safety and repair expenses. A harmonized European regulation is needed for this measure to be effective.

**Vincent Duranton**

Euro-modular vehicles will boost efficiency, cut transport costs, and reduce CO emissions. However, adapting infrastructure and training drivers will be essential.

**> CAN COLD CHAIN LOGISTICS AND INTERMODALITY COEXIST IN THE SAME SPACE? WHAT MEASURES SHOULD THE GOVERNMENT IMPLEMENT TO GET TRUCKS ON TRAINS AND SHIPS?**

**Alex de Vaan**

They can coexist perfectly, as long as there are sufficient intermodal transport options available. The “barriers” caused by different track gauges between Spain and France’s railway networks are finally being removed, which means trains carrying refrigerated products will increase their capacity in the coming years. Regarding short sea shipping, greater ship capacity from ports like Barcelona, Valencia, and Bilbao would facilitate the growth of refrigerated transport to countries like the UK and Ireland. In both cases (train and ship), the government could offer more subsidies to the stakeholders involved, promoting a stronger alternative to road transport.

**Ángel González**

For maritime transport, we truckers have become massive users of short sea shipping. It's unthinkable to drive from the peninsula to places like Rome without considering this option. With the UK, we still have work to do (transit speed is a major issue), but I'm confident we'll soon find ways to improve

(to page 14)

**SURVEY | COLD LOGISTICS CHAIN**

(from page 15)

it. Regarding trains, we are clear that, apart from positioning containers in port hinterlands, the only solution to boost rail freight transport is through rail highways. If we want to meet the 2030 Agenda set by the Ministry, we must accelerate clearance work and improvements on non-competitive sections, such as Algeciras-Bobadilla. If these projects aren't finished until 2027 or 2028, it's impossible to achieve the goal of 10% rail freight from the current 3% if we only start in four years.

**Javier Jiménez**

Companies need to be competitive on their own. When subsidies are mentioned, it often leads to inefficiency. Let's stop relying on subsidies and pass on the real cost of our services. Currently, our infrastructure doesn't support the coexistence of rail and road transport. Transport serves as a buffer for just-in-time supply chains, where stock levels are low (because holding stock is costly). Fast, efficient transport is essential for supplying these tight consumption chains.

**José Esteban Conesa**

Cold chain logistics and intermodality can coexist as long as trains and ships are used for specific segments of the logistics operation. While trucks can operate independently of trains and occasionally of ships, these other modes always rely on trucks for the first or last mile. It's feasible to integrate trains and ships into specific logistics, as they can complement certain segments. However, trains and ships will never complete the entire journey of an operation. The key to integrating them is ensuring they offer benefits without causing delays or rigidity in the logistics chain. Service quality and timing must not suffer due to delays or lack of capacity. Currently, rail services for trucks face capacity issues. For example, a year's worth of truck traffic on rail from La Junquera to cross France equals just a week's worth by road. Capacity and reliability are essential, and today, Spain doesn't have a network capable of offering this service. Even France, with its network, is currently saturated. The government should focus on building a reliable network that allows frequent and regular train services. A few trains per day carrying a maximum of 40 trucks (due to train length and weight) won't be enough. Robust infrastructure is essential to effectively integrate in-

termodality into cold chain logistics.

**Vincent Duranton**

Cold chain logistics and intermodality can coexist perfectly. In fact, integrating different transport modes can enhance efficiency and sustainability in the cold chain. To promote this coexistence, governments should increase investments in specific infrastructure, including the development and improvement of dry ports, rail terminals, and logistics centers equipped to handle refrigerated goods. Financial and tax incentives for companies adopting these solutions would also be beneficial. Additionally, implementing regulations that encourage more sustainable and efficient transport modes is key. Ensuring compatibility of refrigeration standards across different modes is essential to maintain product quality during transfers. Lastly, fostering public-private partnerships can facilitate pilot projects and share best practices in cold chain intermodal logistics. These collaborations can help overcome initial challenges and demonstrate the tangible benefits of intermodal cold chain logistics.

**> WHAT IMPACT ARE DIGITALIZATION AND AUTOMATION HAVING ON COLD CHAIN LOGISTICS, AND WHAT CHALLENGES LIE AHEAD?**

**Alex de Vaan**

Digitalization and automation are transforming cold chain logistics by improving efficiency, accuracy, and sustainability. Digital tools like IoT sensors enable real-time monitoring of temperature, humidity, and location, ensuring the cold chain's integrity and, ultimately, food safety for consumers. This reduces spoilage risk, optimizes inventory management, minimizes waste, and improves customer satisfaction. Automation in refrigerated warehouses with robots and automated systems enhances precision and operational efficiency. However, these advancements come with challenges. Integrating new technologies requires significant investment in infrastructure and staff training, which may be a barrier for some companies. Cybersecurity and system interoperability are key concerns, increasing the risk of cyberattacks and technical failures. Compliance with regulations for perishable goods handling and data protection is also essential. Despite these challenges, embracing digital and automated technologies can maximize potential in

cold chain logistics and ensure food safety.

**Ángel González**

The sector's technology is highly advanced. Clients can now track more about their goods than the drivers themselves: location, stops, speed, temperature, airflow, gradients, and configurable alarms. The real challenge is the digitalization of shipping documents, the e-CMR. It's surprising how difficult this seemingly simple task is for the industry. The administration must establish communication standards and provide support to implement them. Cooperation between the Ministry, transport associations, and shippers can streamline this process.

**Javier Jiménez**

Without collaboration between shippers and carriers, automation is difficult. Fully automated transport requires autonomous trucks, which remains a utopia. The driver shortage is worsening, and transport services need to be paid adequately. Drivers, making significant sacrifices, need better compensation. Without addressing the aging driver workforce, currently averaging over 55 years, the sector won't be sustainable.

**José Esteban Conesa**

Digitalization and automation are rapidly transforming cold chain logistics. At Primafrio, we've adopted these technologies to optimize processes, improve traceability, and ensure product quality. Our cloud-based fleet management system connects over 6,000 vehicles in real-time via IoT sensors, enhancing efficiency and predictive decision-making. Despite these advancements, challenges like cybersecurity remain critical. We renew our ISO 27001 certification annually and invest in advanced protection techniques.

**Vincent Duranton**

Digitalization and automation are revolutionizing cold chain logistics. Technologies improve inventory management, route optimization, and real-time monitoring of temperature and humidity, ensuring product integrity. Using AI enhances decision-making, and blockchain improves traceability. However, challenges include high investment costs, cybersecurity risks, and ensuring system compatibility across the supply chain. Overcoming these barriers is essential for fully realizing these technologies' benefits.

**VINCENT DURANTON**

R&D and Innovation Director



ID Logistics Iberia

**“EURO-MODULAR TRUCKS CAN IMPROVE TIME MANAGEMENT”**

**JAVIER JIMÉNEZ**

CEO  
Moliner Logística



**“COMPANIES NEED TO BE COMPETITIVE ON THEIR OWN”**



Refrigerated transport registrations entered a phase of decline in 2023 after two consecutive years of growth.

SUPPLY CHAIN | ROAD TRANSPORT

# COOLING OFF: REFRIGERATED TRAILER MARKET SLOWS DOWN

REFRIGERATED TRANSPORT REGISTRATIONS DROPPED BY 8.4% IN 2023

The refrigerated transport fleet experienced an 8.4 percent decline last year, with 4,632 trailers registered, according to data from Asfares (the Spanish Association of Trailer, Tanker, and Similar Vehicle Manufacturers). This drop marks a break from the two previous years of growth, where registrations surpassed the 5,000-unit threshold.

However, the downward trend in refrigerated trailer sales has slowed in the first half of this year, decreasing by only 2.2 percent compared to the same period in 2023.

Schmitz Cargobull remains a leading player in the refrigerated segment, with 1,335 units registered last year and a 28.8 percent market share. Notable recent deals include the acquisition of 200 S.KO COOL refrigerated trailers by Grupo Primafrio.

The German multinational, which inaugurated its new factory in Figueruelas (Zaragoza) in 2023, also acquired a majority stake in Atlantis Global System (AGS) in June. AGS is a Spanish specialist in telematics for refrige-

rated logistics, with its technologies widely used by leading Iberian temperature-controlled transport companies.

Following this acquisition, AGS's real-time digital refrigeration telematics system will be available for all Schmitz Cargobull refrigerated trailers produced in Zaragoza. Additionally, data from the Trailer-Connect system, which Schmitz Cargobull installs as standard in all its trailers, can now be accessed through AGS's platform.

Lecitrailer, holding almost a quarter of the market share in 2023 (23.38%), completed significant transactions, including the sale of two Evolution refrigerated duotrailer sets to Tudefrigo and 27 other Evolution refrigerated units from the same manufacturer. In the current year, Lecitrailer has supplied ten additional units to Grupo Gar&Cía, based in Seville, which operates a fleet of over 500 vehicles.

Meanwhile, Sor Ibérica outfitted two of its multi-temperature trailers with fully electric refrigeration units. This system, developed in collaboration with Thermo King and BPW, enables the Advancer Multi-Temperature units to operate emission-free and with low noise levels. This allows nighttime deliveries in urban low-emission zones, enhancing efficiency. The Axle Power system recovers energy while the vehicle is on the road, converting it into power for the refrigeration unit, maintaining optimal cargo temperature with sufficient autonomy.

In addition, registrations of trailers and semi-trailers exceeding 10 tons totaled 14,116 units in 2023, a 2.3 percent decrease compared to the previous year, according to Asfares data.

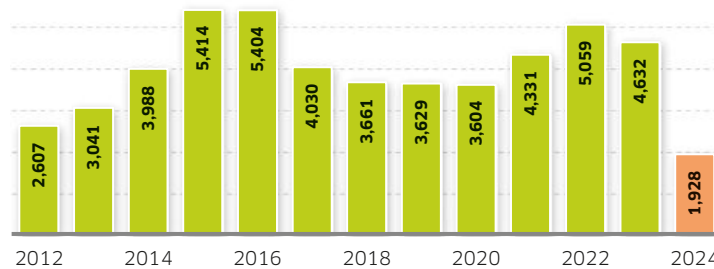
Forecasts predict that year-end totals will reach between 14,300 and 14,400 units, potentially surpassing last year's figures and approaching 2022 levels.

**TWO COMPANIES CONTROL 50% OF THE MARKET**

## DECLINE MODERATES

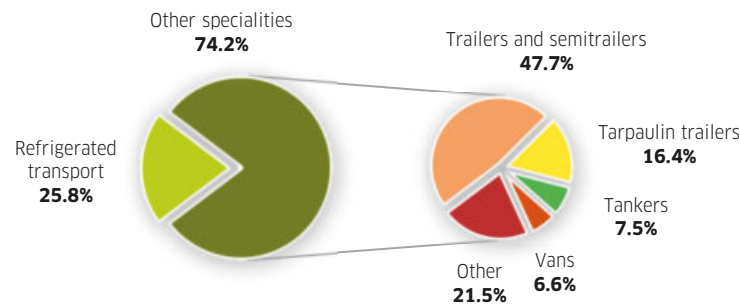
The downward trend in refrigerated trailer registrations has slowed in the first half of 2024, dropping by only 2.2%.

### REFRIGERATED TRAILER REGISTRATIONS



Data in units. Data for 2024 corresponds to the first half of the year.

### DISTRIBUTION BY TYPE



Source: Asfares.

SUPPLY CHAIN | ROAD TRANSPORT

# SPAIN: THE GOLD STANDARD OF EUROPE'S REFRIGERATED FLEET

REFRIGERATED TRANSPORT THRIVES ON INNOVATION, EQUIPMENT UPGRADES, AND A COMPETITIVE EDGE

Refrigerated transport in Spain stands as a model for other logistics sub-sectors to follow. Constant innovation, quality, specialization, and expansion into new markets—all backed by ongoing investment—are the cornerstones of a fleet that plays a leading role in European logistics.

Spain's refrigerated fleet is synonymous with quality, ear-

ning it the 'gold medal' in Europe's fleet rankings. However, as one industry leader put it, the sector is in a "permanent quality Olympics." This dedication is evident in the investment levels of fleet operators, who refresh their equipment every 48 months on average, ensuring they stay one step ahead of their European competitors.



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Spain's Refrigerated Fleet: A Benchmark for Quality in Europe

“Competition with European fleets is mainly hindered by fleet size, taxation, and labor issues, due to the lack of uniform conditions between EU and non-EU countries,” note several industry executives interviewed by Transporte XXI.

Refrigerated transport represents for 23% of the total logistics market in Spain, generating 6.27 billion in sales in 2022, according to the White Paper on Road Transport and Logistics Operators. Sales grew by 18%, driven by strong performance in the food and pharmaceutical sectors, along with financial aid provided by the Ministry of Transport.

#### A Fragmented but Dynamic Sector

The sector consists of over 500 companies, marked by a high degree of fragmentation. However, around 30 companies stand out, led by three major players: Primafrio, Transportes J. Carrión, and Lineage Spain Transportation.

Investment funds, logistics operators, and retail chains are increasingly entering the market, seeking reliable transport

providers to secure their supply chains.

The sector's strong performance and operational excellence have made it attractive to new investors who see promising returns in a competitive and efficient segment of the perishables logistics market.

### THE SECTOR'S COMMITMENT TO INNOVATION AND EFFICIENCY HAS DRAWN NEW INVESTORS

#### Persistent Challenges

Despite structural improvements, the sector continues to face longstanding issues. The need for clear contractual agreements

between shippers and carriers, the shortage of professional drivers, and the seasonality of perishable goods transport remain major hurdles.

#### Dependence on Agriculture

Refrigerated transport is closely tied to the agro-food sector and return freight availability. Seasonal demand, weather disruptions, and declining consumption in Europe can directly impact fleet operations. In recent years, the sector has navigated challenges like Brexit-related bureaucracy and soaring energy costs, which have driven up equipment and operational expenses.

# 25

YEARS

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# TRANSITION STILL PENDING

REFRIGERATED TRANSPORT OPERATORS PUSH FOR EMISSIONS CUTS, BUT THE PATH REQUIRES MORE TIME, ALTERNATIVES, AND RESOURCES

The refrigerated transport sector remains committed to decarbonization. Electrification offers a promising pathway, though its rollout is progressing at a cautious pace. According to the Spanish Association of Automobile and Truck Manufacturers (Anfac), the first five months of 2024 saw the sale of just 130 electric trucks, representing a mere 0.8% market share. The industry is calling for more time, resources, and a broader range of alternative fuels to achieve zero emissions.

Partnerships between carriers and shippers play a crucial role in this transition, with the retail distribution sector taking the lead in supporting a sustainable change.

### Collaborative Initiatives Drive Electrification

For example, the refrigerated transport specialist Grupo Mazo has added two

Mercedes-Benz e-Actros electric trucks to deliver goods to Lidl stores in Gran Canaria, as part of Lidl's decarbonization plan.

Makro has integrated 11 electric trucks for last-mile deliveries to the hospitality sector. Initially deployed in Barcelona and Palma, these vehicles now operate in Madrid, Bilbao, San Sebastián, Pamplona, Victoria, and Málaga. Makro's key partners for this initiative include Transporte Inmediato, a subsidiary of Ader under the South African multinational SuperGroup, and JAC Motors Iberia, the Spanish subsidiary of the Chinese electric truck manufacturer.

Eroski has introduced a Renault E-Tech D16 electric truck, managed by the Biscay-based Aukera Logística, for deliveries in Bilbao. This complements a Volvo FE Electric, operated by Grupo Fuentes (now part of



130

**ELECTRIC TRUCKS SOLD IN FIVE MONTHS**



Glaciarr 2030 facilities in Malaga



Image of the MCS charger introduced by Disfrimur.

Lineage), which Eroski deployed in Pamplona in 2022.

Transvasa, now part of the Cantabrian business group Garvasa Logística, has also added a Volvo FH Electric truck to serve its retail distribution clients.

Mercadona joined the eco-efficiency movement in 2023 by deploying four electric trucks for store deliveries and supplier pickups, partnering with Disfrimur and Acotral. Disfrimur's fleet now includes eight electric vehicles, supported by fast-charging stations in Alicante and Murcia capable of delivering 180 kW for full recharges in just over two hours.

In Murcia, Disfrimur has also introduced Spain's first Megawatt Charging System (MCS), developed by Iberdrola and bp pulse. This charger, delivering up to 1,440 kW, can boost battery levels from 10% to 80% in just 30 minutes.

Primafrío continues to operate 15 Volvo FH Electric trucks, deployed last year to collect temperature-controlled produce in Murcia for delivery to the German supermarket chain Edeka.

### Food Industry Supports Green Logistics

The food industry is also driving decarbonization in refrigerated transport.

Campofrío, part of Mexico's Sigma Group, collaborates with Noriega Grupo Logístico and Alianza Logística (part of Galadtrans) to operate an electric truck paired with a refrigerated trailer.

### COCA-COLA, ONTIME, AND VOLVO PUSH FOR ELECTRIC FLEETS

Transnugon has added two Mercedes e-Actros 300 trucks for deliveries to clients such as Manantiales del Portell, Heineken, and the retail chain Consum.

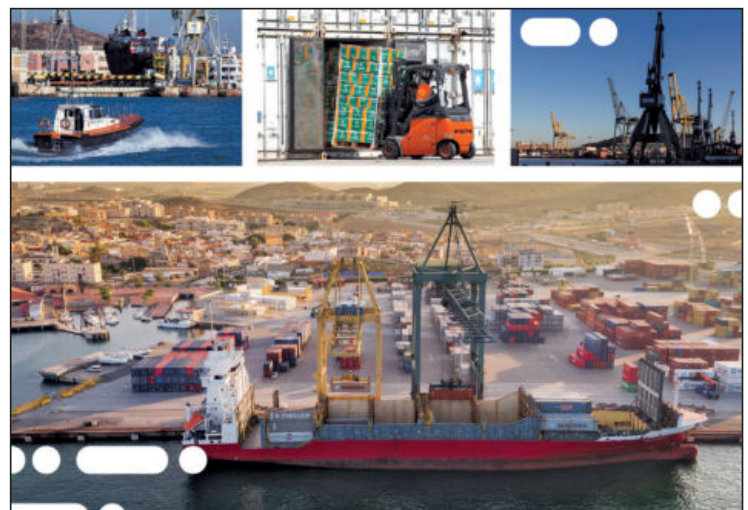
Meanwhile, a collaboration between Coca-Cola Europacific Partners, Ontime, and Volvo Trucks aims to introduce 20 electric trucks to their fleet.

### NATURAL GAS: AN IMMEDIATE SOLUTION

While electrification progresses slowly, natural gas is emerging as a practical, short-term solution for improving environmental sustainability.

Delgo Operador de Transporte operates 155 LNG-powered trucks and plans to add another 50 this year. Noriega Grupo Logístico has strengthened its fleet with 86 LNG heavy vehicles in recent years. Similarly, ESP Solutions uses LNG for 8% of its 1,350-vehicle fleet.

Gasnam-Neutral Transport advocates combining natural gas with biomethane to enhance sustainability. However, the viability of this approach depends on a stable regulatory framework with clear guidelines and direct incentives for adoption.



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INTERVIEW | JOSÉ MARÍA ARNEDO MEDINA, ATFRIE PRESIDENT

# “WE ARE AN ESSENTIAL SECTOR THAT NEEDS TO SCALE UP”

JOSÉ MARÍA ARNEDO, PRESIDENT OF ATFRIE, HIGHLIGHTS THE ROLE OF REFRIGERATED TRANSPORT IN PERISHABLES LOGISTICS AND CALLS FOR SOLUTIONS TO INDUSTRY CHALLENGES. By Antonio Martínez

## ► What is the current state of refrigerated transport in Spain

Looking at many companies' financials, I wouldn't say the sector is in excellent health, but it's not terrible either. Many businesses are on the edge, where even a small setback could be fatal. Fortunately, some companies have the financial strength to push forward.

## ► There have been numerous mergers and acquisitions in recent years. Is refrigerated transport becoming a hot sector or a safe haven for investors?

It's not a trend; it's a necessity. This sector is essential, even though many companies are at risk of failure. Supermarkets, often through investment funds, are securing the logistics they need to get produce from the fields to store shelves. This can't be a safe haven—it must scale up. Some companies have expanded and acquired stakes in others thanks to investment funds, but only time will tell how that plays out.

## ► Is there a risk that family-run businesses will be replaced by speculative investors?

Absolutely. Small and medium-sized enterprises need to grow or they will disappear. Those with fewer than 100 trucks will struggle to survive. Companies with 150 to 200 trucks might end up serving larger logistics groups.

## ► Are truck and trailer manufacturers now the primary financiers for the industry?

There was a time when banks pulled back, and manufacturers stepped in. Their financing arms operate like banks, assessing a company's creditworthiness based on past performance and reliability. They scrutinize independent operators closely because they

know more about the transport market than traditional banks.

## ► Some fleet operators now sell trucks through their own dealerships. Why is that.

Some transporters have become authorized dealers due to their long-standing relationships with manufacturers. This setup offers advantages like better warranties and spare parts availability. Additionally, purchasing cooperatives are emerging, where groups of transporters pool resources to buy trucks, often favoring specific brands.

## ► Refrigerated transport in Spain recorded 6.2 billion in sales in 2022, a 17% increase over 2021. Was this growth genuine or government-aided?

Sales were artificially boosted by government subsidies: 2,500 per truck and 0.20 per liter of fuel. These subsidies made the 2022-23 financial results look better than they otherwise would have. We'll see how things unfold now that these supports are gone, except for professional diesel subsidies.

## ► You've called for industrial profitability in the sector. Is that goal closer to reality?

Profitability was acceptable in 2022-23, but that was due to subsidies. Now, we'll see what happens. Some companies still fail to file financial statements year after year.

## ► How have “historic” agreements with the government changed the industry?

There was progress with the Ministry of Transport, but now we seem to be in a period of inactivity. The government needs to address unresolved issues left by the previous minister. Our association deserves attention—we represent

the largest refrigerated fleets in Spain.

## ► How is the ban on loading and unloading working?

I haven't heard of widespread compliance. It's disappointing that a clear legal ban isn't fully enforced. If a driver gets injured while loading or unloading, the legal consequences can be severe. Additionally, pallet exchange is banned in Spain, and we're pushing for this ban across Europe.



## ► How is the mandatory fuel surcharge clause being implemented?

Anyone who isn't applying it must have money to spare. The law allows it, and it's being used.

## ► How is the industry tackling decarbonization?

We've discussed this in the National Transport Committee to understand the economic impact. We need clarity on whether it's a tax or a toll. The sector makes significant investments in equipment, and a clear future roadmap is essential.

► **What are your thoughts on HVO fuel, which can cut CO emissions by 90% compared to diesel?**

It's a promising option. The purchase of electric trucks is four times more than conventional ones and have range limitations. HVO is the most viable alternative right now.

► **Will electric trucks have a place in short-haul transport?**

Yes, for short distances. Initially, clients may support the switch, but ultimately, transporters bear the higher leasing

► **What steps are being taken to make the driving profession more attractive?**

The ban on loading and unloading and the end of pallet exchanges are positive steps. Companies are modernizing, providing rest areas for drivers, and some shippers are becoming more considerate.

► **Do salaries need to increase?**

Yes. International drivers earn between 2,500 and 3,000 a month. They should be earning 4,000 to 5,000, given the time spent away from their families.



TRANSPORTE XXI

costs. Right now, it's more about projecting an eco-friendly image than a practical solution, the implementation of alternative energies is going to take time.

► **How is the driver shortage affecting the sector?**

There are indeed trucks sitting idle due to a lack of drivers, even as new fleets are being purchased, so that suggests that someone must be driving them. Anyways, buying 150 new trucks nowadays increases the likelihood of more vehicles going unused.

■ **"HVO IS THE MOST VIABLE ALTERNATIVE FOR CUTTING EMISSIONS"** ■

This sacrifice needs to be fairly compensated.

► **ATFRIE has long called for a dedicated collective bargaining agreement for refrigerated transport. Is there progress?**

We want a unified agreement for national and international refrigerated transport because of our unique needs. We have an agreement with UGT (General Union of Workers), and we see more openness from Comisiones Obreras. I hope all parties recognize the need to improve our sector.

SUPPLY CHAIN | COLD LOGISTICS COMPANY RANKINGS

# COLD LOGISTICS HEATS UP IN A CHALLENGING YEAR'

REFRIGERATED TRANSPORT AND LOGISTICS OPERATORS BOOST SALES BY 16% IN 2022, SETTING A NEW RECORD

Despite the challenges of 2022—marked by the war in Ukraine and a two-week trucker strike in March—cold chain logistics achieved its second consecutive year of growth. Road-based refrigerated transport companies and specialized logistics operators generated over 8.14 billion in revenue, a 16% increase over the previous year and 23% above pre-pandemic levels.

These figures come from the White Paper on Road Transport and Logistics Operators by Transporte XXI, based on a sample of over 4,500 companies, 600 of which specialize in temperature-controlled storage and transport. This segment accounts for 22.5% of total road transport and logistics sector sales.

## SALES SURPASSED €8.14 BILLION IN 2022

### Refrigerated Transport Drives Growth

Refrigerated road transport remains the backbone of Spain's cold logistics sector, supporting the country's vast agricultural exports, particularly to Europe. This segment generated nearly 6.27 billion in revenue, up 17.6%, representing 77% of the total. Logistics operators contributed over 1.87 billion (+12%), making up the remaining 23%.

This growth contrasts with the stagnation in Spain's fruit and vegetable exports, which remained flat at 18 million tons (-0.04%). The revenue increase can largely be attributed to rising prices, higher operating

costs, and government measures under the National Plan to Mitigate the Economic and Social Impact of the War in Ukraine. Notably, these measures included a 0.20 per liter diesel subsidy and direct financial aid for transport companies, which

significantly boosted profit margins.

### Top Performers in Cold Logistics

Refrigerated transport is the second-largest specialty in Spain's logistics sector, representing

22.9% of total sales, behind general freight and parcel services (59.5%). Logistics operators account for 21.4% of the cold logistics market, which exceeded 8.75 billion in 2022.

Leading the sector once again is Primafrio, the Murcia-

## SMES DRIVE THE INDUSTRY

Only 34 large companies (employing 250 or more workers and generating an annual turnover above €50 million) collectively recorded revenues nearing €4 billion. This means 5.6% of the companies analyzed control almost half (49.1%) of the sector's business.

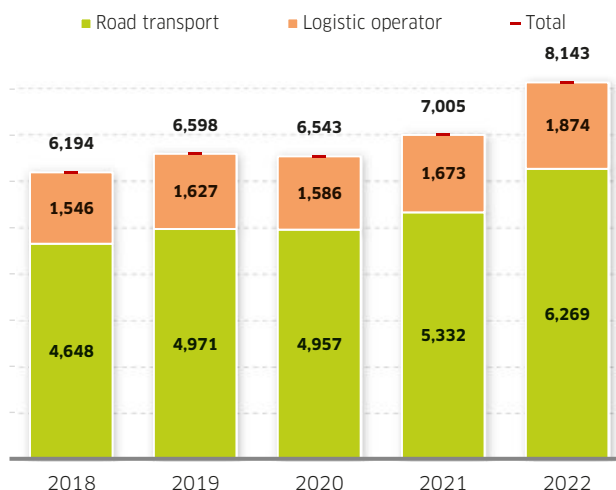
	2022			%22/21			%22/20		
	NO.	SALES	SHARE	NO.	SALES	SHARE	NO.	SALES	SHARE
<b>Big</b> (> 50 mill.)	34	3,996.4	49.1%	+4	+712.2	+22%	+9	+1,217.5	+44%
<b>SME</b>	523	4,146.5	50.9%	-14	+426.2	+11%	-42	+327.4	+9%
<b>Medium</b> (50-10 mill.)	174	2,936.0	36.1%	-1	+337.7	+13%	-8	+295.8	+11%
<b>Small</b> (10-2 mill.)	268	1,147.2	14.1%	-6	+89.6	+8%	-19	+45.0	+4%
<b>Micro</b> (< 2 mill.)	81	63.3	0.8%	-7	-1.1	-2%	-15	-13.5	-18%
Ext / inac	43	0	-	+10	-	-	+33	-	-
<b>TOTAL</b>	<b>600</b>	<b>8,142.9</b>		<b>+0</b>	<b>+1,138.4</b>	<b>+16%</b>	<b>+0</b>	<b>+1,544.9</b>	<b>+23%</b>

Figures in millions of euros. Source: Transporte XXI.

## COLD CHAIN LOGISTICS ACCELERATES GROWTH

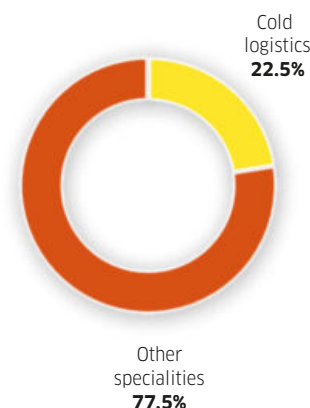
This sector, which achieved sales exceeding €8.14 billion in 2022 (up 16%), accounts for 22.5% of the total revenue in road transport and logistics operations.

### EVOLUTION



Figures in millions of euros. Source: Transporte XXI.

### SHARE 2022



based company managed by the Conesa family. Primafrio surpassed 600 million in revenue, a 17% increase from the previous year and a 42% jump compared to 2019.

- Other major players include:
- DHL Exel Supply Chain Spain: 454 million (+8%)
  - STEF Iberia: 264 million (+21%)
  - Transportes J. Carrión: 255 million (+25%)
  - Logista Pharma: 195 million (+5%)

## ROAD TRANSPORT DOMINATES WITH A 77% MARKET SHARE

### Murcia and Andalusia to Lead the Way

Spain's Mediterranean regions dominate cold logistics. Murcia leads all regions, with 93 companies generating 1.9 billion in 2022 (+16%), representing 23% of the national total. Four Murcian companies rank in the Top 10: Primafrio, Lineage Spain Transportation (formerly Transportes Agustín Fuentes e Hijos), A.T. La Espada, and Transportes Grupo Caliche.

Murcia and Andalusia com-

### CLOSE TO THE AGRICULTURAL HUBS

Murcia and Andalusia, regions responsible for over half (52%) of Spain's fruit and vegetable exports, lead the revenue charts. Their combined income surpasses €3.51 billion, representing 43% of the nation's cold chain logistics market.

COMMUNITY	COMPANIES	2022	%22/21	%22/19	2021	2020	2019	EMPLOYMENT		SHARE	
								2018	2020	SALES	EXPORTS
Murcia	93	1,908.5	+16%	+33%	1,638.9	1,486.8	1,438.9	1,336.3	6,325	23%	18%
Andalusia	117	1,607.2	+19%	+21%	1,345.5	1,267.9	1,327.6	1,236.8	8,691	20%	34%
Madrid	29	1,402.4	+13%	+19%	1,240.6	1,122.3	1,182.3	1,138.7	7,779	17%	2%
Valencian Cmty.	85	954.6	+17%	+25%	817.2	768.7	760.6	712.5	4,307	12%	28%
Cataluña	62	788.7	+14%	+29%	693.1	647.4	612.2	587.8	3,898	10%	7%
Galicia	46	346.4	+15%	+22%	301.8	277.6	283.3	260.8	1,586	4%	1%
Basque Country	22	258.3	+26%	+38%	204.7	185.4	187.4	170.9	1,254	3%	1%
Castilla - La Mancha	22	257.5	+21%	+11%	212.3	249.6	232.2	214.2	1,780	3%	2%
Aragon	21	148.3	+16%	+7%	127.6	120.1	138.3	131.5	931	2%	1%
Castilla - León	19	129.5	+5%	0%	122.8	123.4	129.2	116.1	1,193	2%	2%
Navarre	13	98.7	+13%	+11%	87.2	88.5	89.1	84.6	525	1%	3%
Balearic Islands	11	53.1	+10%	-7%	48.2	49.3	57.4	55.5	397	1%	0%
Cantabria	8	49.4	+13%	+22%	43.8	41.4	40.5	36.4	503	1%	0%
Asturias	16	49.0	+18%	+17%	41.6	40.3	41.9	39.4	337	1%	0%
La Rioja	11	42.0	+20%	+27%	34.9	33.1	33.0	30.4	344	1%	0%
Canary Islands	18	34.3	+11%	+11%	30.9	29.5	30.8	30.0	346	0%	0%
Extremadura	7	15.2	+13%	+13%	13.4	12.2	13.4	12.0	145	0%	1%
<b>TOTAL</b>	<b>600</b>	<b>8,142.9</b>	<b>+16%</b>	<b>+23%</b>	<b>7,004.5</b>	<b>6,543.5</b>	<b>6,598.0</b>	<b>6,193.9</b>	<b>40,341</b>	<b>100%</b>	<b>100%</b>

Figures in millions of euros. \*Sales share: Market share of the national total in 2022. Export share: Share of exports of fruit and vegetable products in 2022 (by weight). Source: Transporte XXI.

combined accounted for 52% of Spain's fruit and vegetable exports and 3.51 billion in revenue, representing 43% of the cold logistics market.

#### A Market Dominated by SMEs

Although the sector includes

only 34 large companies (those with 250 or more employees and over 50 million in annual revenue), these firms collectively earned nearly 4 billion. In other words, 5.6% of the companies account for 49.1% of the total market.

#### Key Figures

- 8.14 billion in sales in 2022 (+16%).
- 77% of cold logistics revenue comes from road transport.
- 23% of the market is held by logistics operators.

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## REFRIGERATED TRANSPORT COMPANIES IN SPAIN | RANKING BY SALES IN 2022

RK	COMPANY	SPECIALITY	PROVINCE	YEAR OF EST.	SALES					Resultas	Assets	Workforce
					2022	%22/21	%22/19	2021	2020			
1	Primafrio SL	Road transport	Murcia	1999	600.50	+17%	+42%	511.42	456.76	24.84	16.96	412
2	DHL Exel Supply Chain Spain SL	Logistic Operator	Madrid	1984	454.13	+8%	+7%	419.94	390.67	10.37	36.70	3.280
3	STEF Iberia SA	Logistic Operator	Madrid	1989	264.19	+21%	+24%	218.88	201.01	12.04	100.11	1.321
4	Transportes J Carrión SA	Road transport	Almería	1980	255.17	+25%	+1%	204.40	190.12	8.93	22.29	1.386
5	Logista Pharma SA	Logistic Operator	Madrid	1998	194.93	+15%	+58%	170.05	135.32	9.58	10.86	518
6	Lineage Spain Transportation SL	Road transport	Murcia	1992	183.50	+7%	+16%	170.83	162.83	15.80	22.27	837
7	AT La Espada SL	Road transport	Murcia	2000	137.29	+26%	+75%	108.82	90.93	4.26	9.17	105
8	Salvesen Logística SA	Logistic Operator	Madrid	1996	n.a.	-	-	137.26	136.64	-	-	901
9	Grupo Tranosuba SL	Road transport	Huelva	1985	126.18	+11%	+26%	113.27	105.62	2.61	8.83	179
10	Transportes Grupo Caliche SL	Road transport	Murcia	1987	123.47	+22%	+56%	100.93	87.89	2.85	18.68	229
11	Isabel Alonso Alonso SL	Road transport	Almería	1999	120.95	+26%	+62%	96.37	84.61	7.56	30.28	430
12	Hermes Logística SA	Road transport	Barcelona	1982	116.49	+12%	+109%	104.38	104.13	1.65	10.47	191
13	Transportes Mazo Hermanos SA	Road transport	Valencia	1972	114.29	+14%	+9%	100.50	103.90	-0.60	42.28	523
14	Sabetrans SL	Road transport	Huelva	1987	111.91	+21%	+92%	92.71	88.94	5.64	30.08	664
15	Agencia Transportes Trota SA	Road transport	Lleida	1984	106.38	+22%	+38%	87.49	81.05	2.61	14.30	480
16	Delgo Operador de Transporte SL	Road transport	Valencia	2007	86.03	+37%	+138%	63.01	46.47	1.17	4.26	478
17	Transintercano SL	Road transport	Almería	1991	77.33	+10%	+22%	70.19	68.33	6.49	48.17	547
18	Molinero Logística SL	Logistic Operator	Soria	1989	75.82	+6%	+1%	71.64	72.79	1.03	10.45	741
19	Tudefrigo SL	Road transport	Gipuzkoa	1993	68.10	+35%	+81%	50.62	42.39	0.58	4.56	228
20	Transportes Penades e Hijos SL	Road transport	Albacete	1987	67.29	+45%	+78%	46.35	38.99	2.79	9.58	500
21	Disfrimur SL	Road transport	Murcia	1997	62.26	+10%	+4%	56.61	56.63	0.84	7.56	752
22	Galadtrans 2009 SL	Road transport	Castellón	2009	58.77	+23%	+25%	47.93	45.48	0.99	2.52	48
23	Explotación Internacional de Transportes SL	Road transport	Alicante	1965	n.a.	-	-	56.36	43.59	-	-	200
24	Olano Seafood Ibérica SA	Road transport	Gipuzkoa	1989	52.41	+15%	+19%	45.51	43.24	2.25	7.77	77
25	Campillo Palmera SL	Road transport	Murcia	2012	49.69	+17%	+12%	42.41	39.84	1.56	15.31	218
26	Fresh & Carry SA	Road transport	Murcia	1998	48.06	+27%	+99%	37.76	24.69	0.23	1.61	23
27	Castillo Trans SA	Road transport	Alicante	1983	46.13	+4%	-2%	44.44	43.86	1.15	9.08	353
28	Francisco Pérez Rodríguez SA	Road transport	Almería	1986	45.95	+25%	+63%	36.88	31.61	0.75	3.51	249
29	Transportes Yagüe 1955 SL	Road transport	Madrid	1978	41.55	+94%	+162%	21.47	18.82	1.61	3.85	52
30	STEF Los Olivos SA	Logistic Operator	Madrid	1988	40.70	+35%	+150%	30.23	19.36	2.38	3.60	403
31	Juan Francisco Aranda SL	Road transport	Granada	1994	40.42	+36%	+68%	29.83	23.00	3.11	12.33	267
32	Transmoro SL	Road transport	Huelva	1992	40.29	+88%	+211%	21.42	15.26	0.20	3.28	335
33	Aralogic SL	Road transport	Zaragoza	2006	40.20	+22%	+29%	32.89	30.88	0.32	2.15	187
34	Transportes Eurocruz SL	Road transport	Murcia	1996	40.13	-1%	-6%	40.38	41.93	0.26	7.59	223
35	Primavía Europe SL	Road transport	Murcia	2018	39.77	+98%	+333%	20.09	10.47	0.02	0.51	329
36	Zolve España Logística y Transporte SA	Road transport	Madrid	1990	n.a.	-	-	37.99	34.65	0.33	7.35	228
37	Capitrans SL	Road transport	Murcia	1992	37.56	+15%	+13%	32.70	31.90	2.51	10.29	192
38	Operadores Logísticos del Mediterráneo SA	Logistic Operator	Murcia	1992	35.97	+9%	+17%	32.94	32.06	0.66	2.77	51
39	Transfrio Rias Baixas SL	Road transport	Pontevedra	2016	35.72	+32%	+65%	27.12	23.18	0.70	3.48	121
40	Alloga Logística (España) SL	Logistic Operator	Toledo	1997	35.52	+56%	+111%	22.75	17.81	1.88	8.25	153
41	Transportes Frigoríficos Narval SL	Road transport	Madrid	1998	35.49	+19%	+35%	29.79	22.94	0.23	2.00	205
42	Agetrans Demetrio e Hijos SL	Road transport	Murcia	2000	34.73	+24%	+54%	27.91	24.01	0.98	3.78	259
43	Transportes Tresserras SA	Road transport	Girona	1947	34.02	+17%	+10%	29.17	25.83	0.29	3.03	102
44	Transportes Hermanos Corredor SA	Road transport	Murcia	1982	33.01	+27%	+39%	26.01	24.52	0.53	6.37	173
45	Austrian Fruits SL	Road transport	Lleida	2009	32.76	+17%	+2306%	28.07	8.96	0.36	1.25	245
46	Inter Trans Pérez Casquet SL	Road transport	Almería	1999	32.72	+8%	+33%	30.32	27.27	0.47	8.75	268
47	Transportes J Carbó SL	Road transport	Barcelona	1989	n.a.	-	-	n.a.	32.47	-	-	194
48	Montfrisa SA	Logistic Operator	Madrid	1964	32.00	+19%	+20%	26.90	22.51	0.30	3.97	250
49	Serfri Trucks SA	Road transport	Murcia	2007	30.79	+24%	+65%	24.87	22.50	1.11	2.45	23
50	Servicios Combinados de Logística y Distribución SL	Logistic Operator	Valencia	1998	30.67	+48%	+160%	20.69	18.54	0.75	1.46	97
51	Picking Farma SA	Logistic Operator	Barcelona	1998	30.36	+18%	+37%	25.63	24.06	3.30	24.03	177
52	Olano Norte SL	Road transport	Gipuzkoa	2017	29.95	+75%	+173%	17.16	13.97	0.70	3.17	140
53	Brivio & Viganò España SL	Road transport	Madrid	2018	29.56	+55%	+146%	19.10	18.21	1.30	2.99	71
54	Ondara Logística SL	Logistic Operator	Lleida	2002	29.39	+17%	+47%	25.04	21.66	0.89	5.93	51
55	Frio Nature Almería SL	Road transport	Almería	2012	28.88	+29%	+89%	22.33	17.91	0.75	2.80	10
56	Transportes J Prats SA	Road transport	Girona	1980	28.81	+24%	+21%	23.19	20.23	1.25	5.14	83
57	Transportes Cruz SL	Road transport	Navarra	1975	28.65	+17%	+27%	24.51	23.63	1.07	9.40	167
58	Transfired SL	Road transport	Cuenca	2003	n.a.	-	-	27.70	24.41	-	-	148
59	Agencia Transportes Robles SA	Road transport	Lleida	1985	27.42	+14%	+23%	23.95	22.72	0.75	2.24	311
60	Hervían SL	Road transport	Murcia	1991	26.40	+18%	+33%	22.43	19.93	0.35	6.44	287



REFRIGERATED TRANSPORT COMPANIES IN SPAIN | RANKING BY SALES IN 2022

RK	COMPANY	SPECIALITY	PROVINCE	YEAR OF EST.	SALES					Resultas	Assets	Workforce
					2022	%22/21	%22/19	2021	2020			
61	Rau Load Cargo Barcelona SL	Road transport	Valencia	1998	26.11	+29%	+38%	20.17	17.94	0.98	1.06	17
62	Trans Manolet SL	Road transport	Alicante	1983	25.98	+12%	+16%	23.23	23.11	1.51	7.69	151
63	Transportes Internacionales Eurotransfret SL	Road transport	Alicante	2009	25.55	+6%	+63%	24.04	n.a.	0.20	2.08	205
64	Trans Jaylo SA	Road transport	Navarra	1995	n.a.	-	-	25.46	22.27	-	-	170
65	Indapak Logistic SL	Road transport	Almería	2002	n.a.	-	-	25.46	24.08	-	-	11
66	Rau Load Cargo SL	Road transport	Valencia	1993	25.31	+10%	+19%	23.10	22.62	0.54	2.40	32
67	Organización Farmacéutica SA	Logistic Operator	Guadalajara	1987	25.09	+2%	+31%	24.48	20.77	0.87	15.80	175
68	Transportes Vigar SL	Road transport	Sevilla	1990	24.54	+24%	+32%	19.81	19.74	1.72	16.25	194
69	Cosoltrans Logística y Expedición SL	Road transport	Murcia	2006	24.52	+2%	-9%	23.92	23.10	0.18	1.94	41
70	Mascaró Morera SL	Road transport	Baleares	1995	n.a.	-	-	24.15	18.41	-	-	148
71	Movianto España SL	Logistic Operator	Madrid	2000	22.64	+14%	+5%	19.92	18.22	1.49	11.86	98
72	SA Transvasa	Road transport	Cantabria	1978	22.07	+18%	+31%	18.74	18.04	2.52	19.40	36
73	Euroloma SL	Road transport	Murcia	1993	22.00	+12%	+15%	19.67	19.05	1.13	8.95	1
74	Logidis Sistemas SL	Road transport	Almería	1997	21.99	+16%	-3%	18.92	17.41	0.12	2.29	19
75	Rafa Grau Transportes SL	Road transport	Valencia	2014	21.95	+10%	+55%	19.89	17.02	0.34	1.31	143
76	Frigoríficos de Vigo SA	Logistic Operator	Pontevedra	1940	21.85	-0%	+6%	21.89	19.61	1.69	10.31	98
77	Fredist SL	Logistic Operator	Barcelona	2002	21.31	+31%	+75%	16.27	14.04	1.81	6.06	55
78	Distribuciones y Representaciones Usieto SA	Road transport	Zaragoza	1988	21.14	+25%	+28%	16.95	14.56	1.33	17.91	105
79	Tradomi SL	Road transport	Murcia	1996	20.14	+30%	+46%	15.50	14.61	0.62	4.92	142
80	Transportes Fruteros SL	Road transport	Alicante	1968	20.08	+74%	+244%	11.55	5.98	0.02	1.25	97
81	STEF Transportes Frigoríficos SA	Road transport	Madrid	1967	20.07	+114%	+98%	9.37	9.32	0.43	2.68	124
82	Trans Frio Higueral SL	Road transport	Almería	1997	20.03	+13%	+22%	17.72	17.66	0.09	5.78	196
83	Transportes Piadela SL	Road transport	Coruña	1990	20.02	+17%	+22%	17.09	17.64	1.23	8.67	61
84	Inter Cañabate SL	Road transport	Almería	1995	19.99	+18%	+3%	17.01	17.34	0.33	6.09	12
85	TAE Transportes i Serveis Integrals SL	Road transport	Barcelona	1995	19.92	-0%	-10%	19.96	23.56	0.14	4.99	119
86	Armesa Logística Internacional SA	Road transport	Valencia	2013	19.83	+3%	+7%	19.19	19.80	0.98	7.18	15
87	Innova Logic Transportes SL	Road transport	Valencia	2006	19.57	+40%	+57%	13.96	12.71	1.18	1.84	71
88	Transportes el Mirador Miratrans SL	Road transport	Murcia	1995	19.42	+25%	+41%	15.48	14.90	0.37	1.79	129
89	Logifrio Gestión Frigorífica SL	Logistic Operator	Madrid	2002	n.a.	-	-	19.32	20.63	-0.01	0.39	1
90	Rau Load Cargo Marítima SL	Road transport	Valencia	2004	19.32	+13%	+45%	17.11	15.17	0.94	1.00	22
91	Antonio Marco SL	Road transport	Alicante	1985	19.28	+12%	+31%	17.20	15.04	0.21	2.41	121
92	Interfrive SA	Road transport	Almería	1994	19.26	+14%	-6%	16.91	17.61	0.78	15.24	183
93	S Cabrera SL	Road transport	Almería	1991	19.22	+27%	+27%	15.16	14.88	1.22	16.41	146
94	Frijo Líneas Nórdicas SL	Road transport	Almería	2005	18.83	+24%	+40%	15.24	13.86	1.43	11.72	117
95	Transportes y Excavaciones Valiente SL	Road transport	Sevilla	1993	n.a.	-	-	18.50	17.70	-	-	53
96	Transportes Valin e Hijos SA	Road transport	Lugo	1988	18.23	+16%	-1%	15.66	15.84	0.27	4.02	140
97	Transportes Pibejo SL	Road transport	Madrid	1995	18.04	+26%	+107%	14.35	10.81	0.85	1.62	74
98	Farmavenix SA	Logistic Operator	Guadalajara	2004	18.01	+8%	+18%	16.60	24.81	0.40	9.10	150
99	Getru Logística SL	Road transport	Valencia	2011	17.59	+26%	+51%	13.97	13.36	-0.01	0.49	129
100	Bonfrig FDC Ultracongelados SA	Road transport	Pontevedra	2002	17.55	+18%	+187%	14.88	12.34	0.11	0.14	38
101	Grupo Salas Águila SL	Road transport	Almería	1994	17.45	+27%	+35%	13.76	13.53	1.06	7.63	139
102	Transportes Caudete SL	Road transport	Albacete	1967	17.37	+2%	+76%	17.00	16.96	-2.01	2.53	133
103	Antonio Gijón Operador del Transporte SL	Road transport	Granada	2006	17.27	+12%	+28%	15.47	13.96	0.36	1.96	105
104	Antonio Marfil SL	Road transport	Málaga	1996	17.19	-2%	-	17.61	n.a.	1.18	4.87	190
105	Transportes Frigoríficos Solocanarias SL	Road transport	Sevilla	2001	17.08	+44%	+51%	11.85	11.41	0.51	1.94	43
106	Trans Rocamar SL	Road transport	Valencia	1977	17.07	+18%	+22%	14.51	14.06	0.93	11.10	91
107	Tudefrigo Logística SL	Logistic Operator	Navarra	1999	17.06	+60%	+95%	10.64	8.21	0.13	1.96	19
108	Garvasa Logística SL	Logistic Operator	Cantabria	2002	16.84	+6%	+35%	15.84	14.48	1.12	16.02	383
109	Devesa Express SL	Road transport	Gipuzkoa	1997	16.55	+38%	+23%	11.97	11.55	1.10	3.75	80
110	Transportes Bolipesk SL	Road transport	Cádiz	2004	16.48	+21%	+37%	13.57	12.28	0.45	2.50	36
111	Disalfarm SA	Logistic Operator	Barcelona	1998	16.13	+9%	+10%	14.75	15.19	0.26	5.47	64
112	Transgallego Logistic SL	Road transport	Murcia	1991	15.97	+30%	+38%	12.26	9.64	0.57	2.57	17
113	Tudefrigo Sur SL	Road transport	Almería	1991	15.89	+26%	-17%	12.66	17.10	0.02	0.73	142
114	Aza Logistics SL	Logistic Operator	Valencia	2005	15.71	+71%	+146%	9.21	7.06	-2.05	3.28	138
115	Eurosol Cargo SA	Road transport	Murcia	2005	15.41	+5%	-4%	14.70	14.24	0.66	3.57	92
116	Transportes Euro Almería 2000 SL	Road transport	Almería	2000	15.36	+42%	+104%	10.79	7.56	0.61	1.96	10
117	Transportes Las Maravillas SA	Road transport	Murcia	1987	n.a.	-	-	15.36	13.59	-	-	116
118	Transportes Valle del Oja SL	Road transport	La Rioja	1996	15.24	+18%	+25%	12.96	11.72	2.20	10.33	69
119	Grupo Miguel Ramón SL	Road transport	Tarragona	1986	14.83	+14%	+58%	12.99	9.90	0.40	6.26	80
120	Nova Frio Logística SL	Road transport	Valencia	2018	14.71	+33%	+36%	11.06	10.53	0.10	0.62	26

## REFRIGERATED TRANSPORT COMPANIES IN SPAIN | RANKING BY SALES IN 2022

RK	COMPANY	SPECIALITY	PROVINCE	YEAR OF EST.	SALES					Resultas	Assets	Workforce
					2022	%22/21	%22/19	2021	2020			
121	Frío Guerrero SL	Road transport	Almería	2006	14.65	+28%	+57%	11.41	10.06	0.11	0.28	11
122	José María Navajas SL	Road transport	La Rioja	1998	14.45	+26%	+31%	11.50	11.37	0.51	6.28	106
123	Transportes Sindo SL	Road transport	Sevilla	1976	14.36	+4%	-18%	13.76	15.72	0.18	6.29	81
124	Frialia Logística SA	Logistic Operator	Pontevedra	1986	14.13	+10%	+28%	12.82	9.45	1.95	12.58	44
125	Delta Stocks Logistics Global SL	Road transport	Tarragona	2017	14.04	+6%	-8%	13.22	13.25	0.49	1.99	16
126	Cronofrío SA	Road transport	Girona	2001	14.02	+8%	-4%	12.94	12.54	0.12	2.21	57
127	Estela Trans SL	Road transport	Almería	1994	13.70	+19%	+36%	11.49	9.68	0.29	2.91	87
128	Alianza Galadtrans SL	Road transport	Castellón	2012	13.48	+2%	+1%	13.19	11.72	0.19	0.49	9
129	Almacenes Pogar SL	Road transport	Cuenca	1987	13.41	+30%	+25%	10.31	9.11	0.29	1.05	137
130	Tojeiro Transportes SA	Road transport	Coruña	1977	12.79	+23%	+28%	10.44	10.37	0.60	15.19	41
131	Transportes Internacionals R Fuster SL	Road transport	Alicante	2005	12.70	+6%	+26%	12.00	10.05	0.09	1.25	98
132	Transportes y Logística TLX SL	Road transport	Murcia	2011	12.63	+53%	+89%	8.23	7.42	1.19	2.32	107
133	Transportes Tarragona SA	Road transport	Lleida	1985	12.50	-20%	-37%	15.70	18.30	-0.72	0.11	39
134	Kronofrío Logistics SL	Logistic Operator	Alicante	2012	12.49	+11%	+25%	11.24	10.72	0.10	0.65	86
135	Logística Eurocruz SL	Road transport	Murcia	2005	12.17	-3%	+41%	12.54	8.81	0.43	1.56	79
136	Ondatrans Tractores SL	Road transport	Lleida	2014	12.05	+46%	+158%	8.24	5.82	0.08	0.55	89
137	Interbalsa SL	Road transport	Murcia	1993	12.04	+20%	+15%	10.01	10.23	0.44	3.08	85
138	Kartin SL	Road transport	Pontevedra	1997	11.97	+16%	+13%	10.28	9.97	0.45	1.51	70
139	SC Gallega Cofrivigo	Road transport	Pontevedra	1982	11.92	+17%	+8%	10.22	11.39	0.02	0.51	10
140	Frío Alcontar SL	Road transport	Almería	2010	11.71	+52%	+231%	7.71	5.32	0.08	0.40	92
141	Orcelitrans SL	Road transport	Alicante	1996	11.63	+41%	+41%	8.26	8.49	0.05	1.00	82
142	Rau Load Cargo Sevilla SL	Road transport	Valencia	1996	11.63	+21%	+54%	9.63	8.41	0.34	0.40	15
143	Murgi Cargo SL	Road transport	Almería	1997	11.55	+10%	+25%	10.49	9.37	0.09	0.67	24
144	Operador Logístico Vitotrans SL	Logistic Operator	Álava	2012	11.35	+26%	+35%	9.03	8.50	0.61	2.14	7
145	Transdonat SA	Road transport	Valencia	1970	11.28	+7%	-	10.51	9.76	0.02	3.18	93
146	Vicente E Escudero SL	Road transport	Alicante	2002	11.26	+15%	+25%	9.77	8.97	0.73	2.29	72
147	Olano Logística del Mar SL	Road transport	Gipuzkoa	2018	11.10	+13%	+18%	9.85	9.52	0.05	0.43	197
148	Vicente Loureda García SL	Road transport	Coruña	1991	11.05	+15%	+14%	9.59	7.90	0.05	2.60	23
149	Cefrusa Servicios Frigoríficos SA	Logistic Operator	Barcelona	1967	10.82	+6%	+41%	10.21	7.91	-0.28	4.42	114
150	Gestión de Manipulación Alimentaria SL	Logistic Operator	Zaragoza	2004	10.78	-1%	-5%	10.93	11.16	1.07	9.86	112
151	Martínez Cobo e Hijos SL	Road transport	Girona	2000	10.77	+10%	+19%	9.83	9.44	0.36	2.83	26
152	Trans Miquel Benavent SL	Road transport	Barcelona	2001	10.63	+15%	+11%	9.21	9.82	0.01	0.76	94
153	Amodo Mio Logist Cargo SL	Road transport	Murcia	2018	10.60	+26%	+98%	8.42	5.91	0.15	0.25	20
154	Genaro Rodríguez e Hijo SL	Road transport	Huelva	1997	10.30	-6%	+18%	10.94	10.87	0.19	1.95	48
155	Satfer España SL	Road transport	Valencia	1983	n.a.	-	-	10.29	10.87	-	-	59
156	Omega Delivery SL	Road transport	Madrid	1998	10.26	+3%	-19%	9.99	10.70	2.58	4.34	7
157	Servicios Logísticos del Pla SL	Road transport	Lleida	1996	10.19	+16%	+15%	8.78	8.43	0.61	6.85	94
158	Frigoríficos de Galicia SA	Logistic Operator	Pontevedra	1972	10.13	+10%	+6%	9.22	8.80	0.21	7.52	51
159	Transgesol SL	Road transport	Almería	2003	n.a.	-	-	n.a.	10.11	-	-	90
160	Frigoríficos de Navarra SA	Logistic Operator	Navarra	1987	10.10	-2%	+43%	10.32	9.47	-0.41	14.65	66
161	Transaguimu SL	Road transport	Almería	2014	10.03	+23%	+32%	8.19	7.06	0.70	5.02	67
162	Interlogística del Frío SA	Logistic Operator	Barcelona	1958	9.99	+21%	+22%	8.28	7.45	0.12	4.92	46
163	Aupatrans Transporte Internacional SL	Road transport	Granada	2013	9.87	-3%	+68%	10.20	7.91	0.31	1.19	70
164	Logística de Cox SL	Road transport	Alicante	2006	9.85	+14%	-14%	8.64	10.58	0.34	0.67	55
165	Frigoríficos del Mercat del Peix SA	Logistic Operator	Barcelona	1990	9.73	+16%	+9%	8.36	8.16	0.82	9.16	87
166	Transmado Express 2002 SL	Road transport	Jaén	2002	9.57	+27%	+19%	7.53	7.39	0.93	3.33	96
167	Pharma Logistics Solutions SL	Road transport	Cádiz	2014	9.50	+93%	+1288%	4.93	1.21	0.24	0.51	174
168	Transportes Cameselle SL	Road transport	Pontevedra	1988	9.50	+26%	+36%	7.53	6.69	0.68	1.86	69
169	Transportes José Valero Ridaó SL	Road transport	Almería	2010	9.49	+39%	+49%	6.82	6.68	0.53	3.26	87
170	Sauratrans SL	Road transport	Murcia	1995	9.43	+5%	+3%	8.97	8.65	0.17	1.86	40
171	Cargo Nijar SL	Road transport	Almería	2012	9.22	+14%	+25%	8.07	8.53	0.31	1.51	15
172	Frío Limpio de Aragón SL	Logistic Operator	Zaragoza	2000	9.12	-13%	+9%	10.46	9.13	-0.37	0.37	94
173	Ascensión García SL	Road transport	Murcia	1998	9.08	+50%	+38%	6.07	5.74	0.54	1.46	50
174	Transportes Frigoríficos RP SL	Road transport	Jaén	1997	n.a.	-	-	9.06	9.91	-	-	72
175	Tircarhe SL	Road transport	Córdoba	2003	8.99	+18%	+29%	7.63	7.08	0.46	5.17	64
176	Transportes Farmacéuticos SA	Road transport	Madrid	1986	8.96	+2%	-1%	8.76	8.97	-0.21	1.70	16
177	Protea Productos del Mar SA	Logistic Operator	Pontevedra	1997	8.91	-5%	+4%	9.34	8.40	0.80	12.22	22
178	Transportes Barceló 2010 SL	Road transport	Baleares	2001	8.85	+12%	+0%	7.88	7.68	0.43	0.85	119
179	Agencia Transportes Almiramar SL	Road transport	Lleida	1997	8.80	+10%	+46%	7.97	6.62	0.01	0.95	58
180	Yonatan Pérez Suárez SL	Road transport	Lugo	2013	8.69	+1%	-28%	8.57	8.95	0.18	-0.29	53

REFRIGERATED TRANSPORT COMPANIES IN SPAIN | RANKING BY SALES IN 2022

RK	COMPANY	SPECIALITY	PROVINCE	YEAR OF EST.	SALES					Resultas	Assets	Workforce
					2022	%22/21	%22/19	2021	2020			
181	Rau Load Cargo Denia SL	Road transport	Valencia	2005	8.66	+31%	+10%	6.63	7.65	0.27	0.34	8
182	Transportes Francisco Bonilla Pozo SL	Road transport	Jaén	1995	8.65	+21%	+42%	7.15	5.86	0.00	0.78	85
183	Merlatrans SA	Road transport	Murcia	1990	8.64	-8%	-24%	9.39	10.32	-0.97	0.92	44
184	Caserfri SL	Logistic Operator	Zaragoza	1999	8.55	+6%	+5%	8.07	8.38	0.66	14.50	72
185	Deco Pharma Servicios Logísticos SL	Logistic Operator	Madrid	2008	8.53	-13%	-56%	9.77	7.78	0.37	3.43	66
186	Transportes Frigoríficos García Ramiro SL	Road transport	Girona	2008	8.53	+28%	+44%	6.66	6.26	0.19	0.85	51
187	Gestión de Servicios Logísticos Silla SL	Logistic Operator	Valencia	2008	8.52	+23%	+3%	6.93	7.45	-0.07	0.32	6
188	TTC Logística Frigorífica SL	Logistic Operator	Coruña	2015	8.52	+13%	+9%	7.54	6.61	-0.03	0.69	28
189	Fri Olvega SL	Logistic Operator	Soria	2001	8.46	+7%	+34%	7.93	7.67	0.49	11.15	114
190	Logísticas Goyanes SL	Road transport	Lugo	2006	8.46	+16%	-1%	7.29	7.64	0.42	2.68	48
191	Hermanos Lardín Vivancos SL	Road transport	Murcia	1991	8.39	-	+49%	n.a.	5.21	0.02	0.21	34
192	Betese Gestión de Sv. de Almacenes y Portes SL	Road transport	Barcelona	2000	8.39	+17%	+4%	7.20	6.94	0.24	1.84	17
193	Potel Torres Transportes SL	Road transport	Pontevedra	2006	8.27	-1%	+10%	8.37	7.94	0.45	3.88	30
194	Logística i Serveis del Fred de Ponent SL	Logistic Operator	Lleida	2014	8.22	+11%	+45%	7.41	6.91	0.95	8.24	50
195	Grupo Hnos Terres Montiel SL	Road transport	Murcia	2006	n.a.	-	-	8.22	7.65	-	-	33
196	Refrilog SL	Road transport	Baleares	2005	8.22	+66%	+1%	4.95	8.57	0.49	1.64	49
197	Logística y Paquetería Horeca SL	Road transport	Sevilla	2015	8.17	+16%	+30%	7.02	5.79	0.06	0.37	39
198	Transportes Arrastio SL	Road transport	Gipuzkoa	1999	8.17	+17%	+19%	6.97	7.20	0.40	2.76	44
199	Transportes Robles Castañón SL	Road transport	León	2003	8.14	+31%	+60%	6.19	5.55	0.00	1.64	59
200	Transleo Sur SL	Road transport	Sevilla	2012	n.a.	-	-	8.00	7.82	-	-	88
201	Transportes Frigoríficos del Segre SL	Road transport	Lleida	2000	7.99	+4%	-5%	7.66	7.10	0.10	1.08	48
202	Olano Valencia SL	Logistic Operator	Valencia	2003	7.96	+33%	+74%	5.99	5.14	0.80	4.22	43
203	Trans Fruit Logistic Penedés SL	Road transport	Barcelona	2012	7.95	+25%	+8%	6.36	5.06	0.30	2.04	61
204	Servicios Logísticos Souto SL	Road transport	Pontevedra	1983	7.91	+30%	+43%	6.11	5.36	0.94	2.57	36
205	Truck-One SL	Road transport	Madrid	2007	n.a.	-	-	7.78	5.95	-	-	49
206	José Hernández Quijada e Hijos SL	Road transport	Murcia	1994	7.72	+23%	+43%	6.27	5.78	0.13	2.35	49
207	Carnes Erdella SL	Road transport	Bizkaia	1984	7.70	+19%	+28%	6.44	6.14	0.46	2.95	79
208	Murgi Servicios Logísticos SL	Road transport	Almería	1995	7.67	+57%	-	4.87	4.86	0.26	0.77	53
209	Hermanos Robledo SL	Road transport	Asturias	1982	7.65	+51%	+69%	5.08	4.16	0.39	2.14	35
210	Fruport Tarragona SL	Logistic Operator	Tarragona	2008	7.56	+1%	+13%	7.47	6.64	0.96	3.00	37
211	Frigo Vanfer SL	Road transport	Lleida	2010	7.47	+5%	+14%	7.08	6.43	0.15	1.96	30
212	Transportes Indo SA	Road transport	Gipuzkoa	1983	7.43	+9%	+10%	6.82	6.27	0.23	2.99	54
213	Americold Algeciras SL	Logistic Operator	Cádiz	2010	7.40	+24%	+56%	5.98	5.27	-0.55	1.19	27
214	Pitarch Logística SA	Road transport	Castellón	1984	7.40	+9%	-7%	6.78	6.82	0.02	5.61	55
215	Lineage Murcia SL	Logistic Operator	Murcia	2001	7.40	-4%	+8%	7.69	7.76	2.18	5.02	74
216	Perea SL	Road transport	Alicante	1972	7.34	-	+15%	n.a.	n.a.	0.02	0.92	49
217	Transportes Frigoríficos Oriol SL	Road transport	Alicante	2005	7.32	-	-	n.a.	n.a.	0.01	1.03	47
218	Giltrans Llutxent SL	Road transport	Valencia	2013	7.29	+57%	+609%	4.65	2.29	0.24	1.32	34
219	Cool Cargo Solutions SL	Road transport	Barcelona	2012	7.28	+10%	+7%	6.62	7.54	0.19	0.46	7
220	Los Gemelos 2001 SL	Road transport	Murcia	2001	7.25	+45%	+59%	4.99	4.67	0.37	1.94	57
221	Lofriastur SL	Road transport	Asturias	2013	7.24	+13%	+13%	6.43	6.29	-0.02	1.78	61
222	Transportes Zaragoza y Merlos SL	Road transport	Murcia	2007	7.23	+30%	+35%	5.57	4.78	0.01	0.35	53
223	Transportes Frigoríficos Transfrikar SL	Road transport	Murcia	2018	7.04	+22%	+77%	5.75	5.84	0.12	0.84	63
224	Olano Murcia SL	Road transport	Murcia	1986	6.99	+5%	-7%	6.68	6.81	0.02	1.15	40
225	Transportes Antonio Belzunces SA	Road transport	Almería	1992	6.98	-	-	n.a.	n.a.	0.04	8.81	37
226	Transportes Papa Alí SL	Road transport	Murcia	1996	6.93	+1%	+7%	6.87	6.50	0.02	0.31	46
227	Trío Operadores Logísticos SL	Road transport	Zaragoza	1997	6.90	+42%	+36%	4.85	5.21	0.15	0.25	56
228	Logística Cerecedo SL	Road transport	León	2011	6.84	+35%	+67%	5.07	4.72	0.02	0.28	45
229	Vicente Colomar Blanco SL	Road transport	Valencia	1988	n.a.	-	-	6.83	5.78	-	-	44
230	Americold Barcelona Palau SA	Logistic Operator	Barcelona	1987	6.81	+16%	+8%	5.88	5.58	-0.95	14.68	24
231	Servi Global Trans 2015 SL	Road transport	Pontevedra	2002	6.75	+60%	+259%	4.23	3.56	0.20	0.61	52
232	Logística Transloyma Huelva SL	Road transport	Huelva	2016	6.73	+66%	+80%	4.05	3.42	0.25	0.75	36
233	Tajotrans SL	Road transport	Toledo	1993	6.72	+7%	+15%	6.31	5.64	0.13	2.49	55
234	Transportes Eugenio Ortiz Novillo SL	Road transport	Ciudad Real	1999	6.72	+32%	-	5.08	n.a.	0.30	2.10	55
235	Frío Albatana SL	Road transport	Albacete	2004	6.70	+9%	+13%	6.12	5.71	0.23	1.12	50
236	Transportes Frigoríficos Huella SL	Road transport	Almería	2018	6.70	+13%	+12%	5.94	6.80	0.14	1.09	49
237	Betrex España SA	Road transport	Valencia	1990	6.68	+13%	+11%	5.92	5.92	0.04	0.38	10
238	Friocavana Internacionales SL	Road transport	Sevilla	2016	6.65	+29%	+45%	5.17	5.48	0.12	0.44	11
239	Moncho Logística de Refrigeración SL	Road transport	Pontevedra	1993	6.63	+12%	+51%	5.92	5.70	0.42	0.88	25
240	Transportes Francisco Cordero e Hijos SL	Road transport	Huelva	1999	6.63	+13%	+17%	5.86	6.44	0.01	0.10	71

## REFRIGERATED TRANSPORT COMPANIES IN SPAIN | RANKING BY SALES IN 2022

RK	COMPANY	SPECIALITY	PROVINCE	YEAR OF EST.	SALES					Resultas	Assets	Workforce
					2022	%22/21	%22/19	2021	2020			
241	Servicios Frigoríficos Caribú SL	Road transport	Badajoz	2014	6.60	+35%	+28%	4.88	4.30	0.39	1.24	46
242	Betiko Trans SL	Road transport	Bizkaia	1996	6.60	-4%	-3%	6.88	6.69	0.28	1.65	38
243	Garcimar Transportes Frigoríficos SL	Road transport	Albacete	2007	6.55	+11%	+10%	5.88	5.62	0.22	1.86	24
244	Trafema SL	Road transport	Pontevedra	1987	6.55	+15%	+29%	5.68	4.81	0.36	3.19	23
245	Americold Barcelona Santa Perpétua SA	Logistic Operator	Barcelona	2004	6.45	+50%	+70%	4.29	4.40	-0.57	25.93	45
246	Cantero Cargo SL	Road transport	Valladolid	2006	6.32	-1%	-19%	6.37	6.88	-	-	52
247	Inter Cox SL	Road transport	Alicante	2004	6.27	+14%	+42%	5.51	4.64	0.37	0.62	25
248	Agencia de Transportes Frigoaljarque SL	Road transport	Huelva	2008	6.22	+10%	+24%	5.63	5.13	0.97	3.00	36
249	Frigoríficos Tisco I SL	Road transport	Alicante	2001	6.21	+33%	+81%	4.65	3.66	0.12	0.43	61
250	AT Vega Halcón SL	Road transport	Alicante	2013	6.20	+30%	+163%	4.78	4.96	0.08	0.49	-
251	Transportes Manuel Ares SL	Road transport	Coruña	1999	n.a.	-	-	6.19	5.75	-	-	49
252	Suditrans SL	Road transport	Murcia	1993	6.10	+13%	+11%	5.41	5.58	0.33	4.70	45
253	Soapa Galicia SL	Road transport	Coruña	1994	n.a.	-	-	6.09	5.01	-	-	13
254	Transportes Vila y Fayos SL	Road transport	Albacete	1977	6.06	+7%	+0%	5.69	5.69	0.10	2.93	36
255	Tir Compostela SL	Road transport	Coruña	2015	6.06	+60%	+250%	3.80	1.80	0.14	0.28	18
256	Arimon Logísticos SL	Road transport	Barcelona	2007	6.05	+28%	+35%	4.72	4.22	0.61	1.76	45
257	Transportes Familia Pico SL	Road transport	Asturias	2014	6.03	+31%	+84%	4.60	4.12	0.05	0.29	31
258	Aberrí Trans SL	Road transport	Navarra	1993	6.00	+20%	+21%	4.99	4.86	0.08	0.10	22
259	Frío Huelva SL	Road transport	Huelva	2000	5.99	+13%	+12%	5.31	5.39	0.30	1.82	29
260	Teletransporte Aragón SL	Road transport	Zaragoza	1991	5.99	-	+13%	n.a.	5.33	0.00	1.91	35
261	Transportes Frío Nature SL	Road transport	Almería	2021	5.99	+476%	-	1.04	0	0.35	0.53	39
262	Lan Logística SL	Logistic Operator	Bizkaia	1999	5.96	+38%	+39%	4.31	3.79	0.03	0.47	16
263	Panero Logística SL	Road transport	Asturias	2003	5.96	+3%	+7%	5.77	5.81	-0.06	2.83	61
264	Transportes Frigoríficos Nazarenos SA	Road transport	Sevilla	1996	5.94	+11%	+22%	5.37	5.13	0.08	0.79	43
265	Frío Logística Soluciones SL	Road transport	Alicante	2014	5.94	+4%	+215%	5.73	8.84	0.01	0.44	4
266	Cibelpa Logística SL	Road transport	Alicante	2011	5.94	+45%	+230%	4.09	2.43	0.07	0.46	2
267	Lofritrans Noroeste SL	Road transport	Pontevedra	2009	5.93	+27%	+52%	4.68	3.92	0.79	2.33	36
268	Disalfrió Centros Logísticos SL	Road transport	Jaén	2002	n.a.	-	-	n.a.	5.89	-	-	22
269	Laytor Trans SL	Road transport	Castellón	2002	5.87	+17%	+9%	5.02	5.71	0.53	3.00	22
270	Whitmore West Company SL	Road transport	Zaragoza	2014	5.80	+27%	+80%	4.57	n.a.	0.04	0.29	24
271	Transfarm Lleida SL	Road transport	Lleida	2012	5.80	+27%	+89%	4.56	4.01	0.09	0.26	119
272	Hermanos García Camilo SL	Road transport	Almería	1997	5.80	+17%	+16%	4.96	5.26	0.56	2.49	38
273	Transportes El Mosca Murcia SA	Road transport	Murcia	1986	n.a.	-	-	5.79	4.08	-	-	71
274	Logística Gens SL	Road transport	Pontevedra	2012	5.76	+6%	+0%	5.42	5.14	0.18	1.16	35
275	Transportes Miguel Parrilla SL	Road transport	Sevilla	1991	5.74	-2%	-28%	5.86	6.52	0.11	-0.63	40
276	Conservas y Frigoríficos del Morrazo SA	Logistic Operator	Pontevedra	1986	5.70	-5%	-10%	5.99	5.21	1.03	7.10	36
277	Solditrans Transporte y Logística SL	Road transport	Murcia	2005	5.60	+21%	+34%	4.61	3.85	0.02	0.60	6
278	Frío Alquería SL	Road transport	Valencia	1995	5.56	+18%	+14%	4.71	4.61	0.53	5.04	41
279	Trans Wences SL	Road transport	Barcelona	1993	5.55	+1%	-48%	5.47	7.85	0.62	3.69	43
280	Transportes Segura y Guevara SL	Road transport	Almería	1992	5.55	+8%	+11%	5.14	5.28	0.21	4.31	45
281	Servicios Logísticos de Caravaca de la Cruz SL	Road transport	Murcia	2007	5.43	-6%	+13%	5.80	4.96	0.07	0.40	33
282	Criado Grupo Logístico SL	Road transport	Zaragoza	2005	5.42	+26%	-1%	4.31	4.12	0.14	-0.03	51
283	Inter Cera SL	Road transport	Almería	2012	5.40	+31%	+12%	4.12	4.09	0.16	1.24	33
284	Logística Nieves SL	Road transport	Málaga	2005	5.35	+29%	+43%	4.15	3.32	0.03	0.12	43
285	Transportes Frigoríficos Macael SL	Road transport	Almería	2000	5.34	+33%	+844%	4.02	1.41	0.23	1.69	38
286	AT Fríobaza SL	Road transport	Granada	2007	5.33	-3%	-4%	5.48	5.84	0.04	0.83	25
287	Salvesen Logística Canarias SL	Logistic Operator	S.C. Tenerife	2006	5.33	+18%	+15%	4.53	4.44	0.51	0.52	30
288	Transdiana SL	Road transport	Murcia	2004	5.27	+18%	+3%	4.46	4.73	0.07	0.97	8
289	Transfrizalo SA	Road transport	Almería	2010	5.18	+42%	+23%	3.66	3.87	0.06	0.65	37
290	Molenbergnatie España SL	Logistic Operator	Barcelona	1994	5.15	+1%	-36%	5.13	6.10	-0.31	1.09	15
291	García Carrasco SA	Road transport	Murcia	1987	5.12	+3%	-7%	4.96	5.14	0.61	4.89	38
292	Hijos de Luis Jurado Transportes SL	Road transport	Jaén	2007	5.11	-15%	-15%	6.03	5.16	0.07	0.73	44
293	Logística Orfeón SL	Road transport	Murcia	2018	n.a.	-	-	5.11	1.41	-	-	36
294	Frío Norte Logísticos SL	Logistic Operator	Álava	2020	5.05	+14%	-	4.44	0	0.20	0.41	69
295	Transportes Erustes SL	Road transport	Toledo	1987	5.02	+13%	-3%	4.45	4.48	0.13	2.23	34
296	Trans Simó SL	Road transport	Valencia	1980	4.95	+23%	+12%	4.04	3.85	0.35	0.80	26
297	Trans Hnos Hernández SL	Road transport	Murcia	2008	4.94	+11%	+32%	4.43	3.99	0.25	1.29	31
298	Dalias Transport SL	Road transport	Alicante	1987	4.91	-18%	-23%	5.99	7.24	-0.09	1.16	42
299	Royaspar Distribuciones y Logísticas SL	Road transport	Madrid	2002	n.a.	-	-	4.90	5.30	-	-	6
300	Trans Dusan SL	Logistic Operator	Zaragoza	1998	4.89	+3%	-10%	4.74	4.81	0.75	1.47	18

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## FRUIT AND VEGETABLE SECTOR | SPANISH TRADE FLOWS TO EUROPEAN UNION BY ROAD

## SPAIN TO EUROPE TRADE BY ROAD IN HORTICULTURAL PRODUCTS

	* %24/23	2023	%23/22	2022	2021	SHARE 2023	2019
Germany	+9%	3,303	-2%	3,358	3,707	26.2%	27.3%
France	+6%	3,299	-8%	3,578	3,550	26.2%	25.5%
Portugal	+7%	1,340	+6%	1,260	1,234	10.6%	8.5%
Netherlands	+0%	1,208	-2%	1,237	1,235	9.6%	9.4%
Italy	+5%	929	-1%	940	1,056	7.4%	8.1%
Poland	+10%	590	-2%	603	693	4.7%	5.2%
Belgium	-6%	536	+1%	531	538	4.3%	3.8%
Sweden	+4%	227	-15%	267	297	1.8%	2.1%
Czech Republic	-7%	225	-3%	233	253	1.8%	1.7%
Denmark	+4%	152	-12%	172	191	1.2%	1.4%
Austria	+2%	144	-10%	160	182	1.1%	1.4%
Rest	+35%	640	-6%	678	741	5.1%	5.5%
<b>TOTAL EU 27</b>	<b>+7%</b>	<b>12,594</b>	<b>-3%</b>	<b>13,018</b>	<b>13,678</b>		

## NETHERLANDS

EXPORTS	* %24/23	2023	%23/19
Citrus fruits	+2%	168	-30%
Other fresh vegetables	+3%	153	-17%
Melons, watermelons and papayas	+13%	89	-21%
Lettuce, endives, chicory...	+3%	66	-12%
Cabbages, cauliflowers, swedes...	+8%	61	-9%
Other	+7%	365	-6%
<b>TOTAL</b>	<b>+5%</b>	<b>903</b>	<b>-15%</b>
IMPORTS	* %24/23	2023	%23/19
Potatoes	-13%	92	+41%
Cooked or frozen vegetables	-35%	44	+23%
Onions, garlic, leeks...	-7%	34	+452%
Tomatoes	-18%	28	-19%
Other	-12%	108	+8%
<b>TOTAL</b>	<b>-15%</b>	<b>306</b>	<b>+26%</b>

## FRANCE

EXPORTS	* %24/23	2023	%23/19
Citrus fruits	+0%	651	-18%
Other fresh vegetables	+6%	306	-12%
Melons, watermelons and papayas	-2%	178	-36%
Lettuce, endives, chicory...	+7%	149	-0%
Cooked or frozen vegetables	+12%	148	-5%
Other	+13%	772	-9%
<b>TOTAL</b>	<b>+6%</b>	<b>2,203</b>	<b>-14%</b>
IMPORTS	* %24/23	2023	%23/19
Potatoes	+10%	771	+29%
Cooked or frozen vegetables	-12%	94	-18%
Apples, pears and quinces	-39%	55	-18%
Dry vine vegetables	+4%	39	-1%
Other	+5%	138	-12%
<b>TOTAL</b>	<b>+5%</b>	<b>1,096</b>	<b>+12%</b>

## PORTUGAL

EXPORTS	* %24/23	2023	%23/19
Potatoes	+25%	161	+34%
Bananas	-10%	110	+21%
Other fresh vegetables	+16%	89	+39%
Citrus fruits	+12%	76	+33%
Cooked or frozen vegetables	-16%	67	+35%
Other	+15%	406	-2%
<b>TOTAL</b>	<b>+10%</b>	<b>909</b>	<b>+14%</b>
IMPORTS	* %24/23	2023	%23/19
Tomatoes	+16%	82	+20%
Potatoes	+8%	54	+18%
Other fresh fruits	-4%	44	+132%
Other fresh vegetables	+121%	42	+59%
Apples, pears and quinces	+14%	42	-14%
Other	-20%	168	-3%
<b>TOTAL</b>	<b>-2%</b>	<b>431</b>	<b>+14%</b>

## IRELAND

EXPORTS	* %24/23	2023	%23/19
Citrus fruits	+41%	26	+20%
Other	+14%	74	+3%
<b>TOTAL</b>	<b>+20%</b>	<b>100</b>	<b>+7%</b>
IMPORTS			
	<b>-14%</b>	<b>0</b>	<b>-50%</b>

## BELGIUM

EXPORTS	* %24/23	2023	%23/19
Citrus fruits	-5%	92	-16%
Cooked or frozen vegetables	+22%	48	-29%
Other fresh vegetables	+2%	38	-3%
Potatoes	+42%	34	+8%
Apricots, cherries, plums...	-2%	25	+8%
Other	+0%	156	+2%
<b>TOTAL</b>	<b>-11%</b>	<b>126</b>	<b>-4%</b>
IMPORTS	* %24/23	2023	%23/19
Cooked or frozen vegetables	-31%	68	+114%
Apples, pears and quinces	+18%	25	+10%
Other	-5%	81	+15%
<b>TOTAL</b>	<b>-13%</b>	<b>174</b>	<b>+39%</b>

## LUXEMBOURG

EXPORTS	* %24/23	2023	%23/19
	<b>-10%</b>	<b>10</b>	<b>+47%</b>
IMPORTS			
	<b>+68%</b>	<b>8</b>	<b>-1%</b>

## AUSTRIA

EXPORTS	* %24/23	2023	%23/19
Citrus fruits	-14%	43	-36%
Other	+15%	94	-23%
<b>TOTAL</b>	<b>+5%</b>	<b>137</b>	<b>-28%</b>
IMPORTS			
	<b>-55%</b>	<b>7</b>	<b>-10%</b>

## SLOVENIA

EXPORTS	* %24/23	2023	%23/19
	<b>-15%</b>	<b>15</b>	<b>-47%</b>
IMPORTS			
	<b>&gt;999%</b>	<b>0</b>	<b>-35%</b>

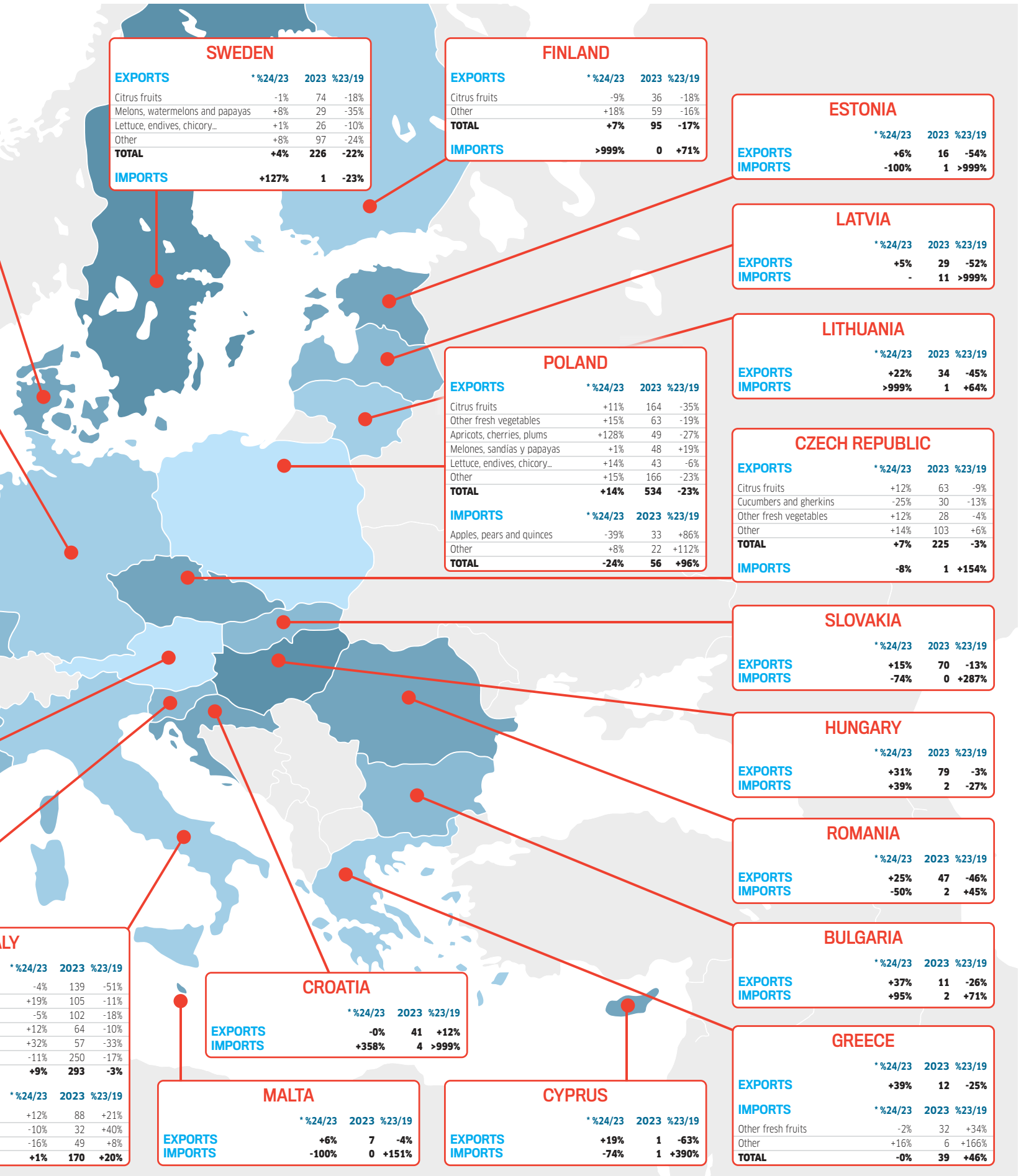
## DENMARK

EXPORTS	* %24/23	2023	%23/19
Citrus fruits	-9%	41	-17%
Other	+9%	107	-26%
<b>TOTAL</b>	<b>+5%</b>	<b>148</b>	<b>-24%</b>
IMPORTS			
	<b>-20%</b>	<b>4</b>	<b>+100%</b>

## GERMANY

EXPORTS	* %24/23	2023	%23/19
Citrus fruits	+1%	869	-20%
Other fresh vegetables	+15%	463	+3%
Melons, watermelons and papayas	-9%	347	-27%
Cucumbers and gherkins	+7%	302	+8%
Apricots, cherries, plums...	+53%	262	-20%
Other	+15%	1,023	-10%
<b>TOTAL</b>	<b>+9%</b>	<b>3,266</b>	<b>-13%</b>
IMPORTACIONES			
	<b>-1%</b>	<b>37</b>	<b>+17%</b>

(\*) Based on traffic in the first half of the year. (\*\*): United Kingdom left the EU in 2020. Its traffic has been eliminated from the entire history for reasons of homogeneity. Spanish imports and exports by road to EU countries.



\* Taric classification headings 07 and 08 (Fruit and vegetables). Traffic in thousands of tonnes. Source: Agenzia Tributaria. Compilation: Transporte XXI.

SUPPLY CHAIN | DISTRIBUTION BY MODE OF TRANSPORT

# TRANSPORT ON WHEELS

ROAD TRANSPORT CHANNELS 80% OF SPAIN'S FRESH PRODUCE EXPORTS, RISING TO 99% FOR EU TRADE

Road transport is the primary logistics partner for Spanish agriculture. Statistics from the Ministry of Industry, Trade, and Tourism, processed by Transporte XXI, leave no room for doubt.

Trucks handle 80 percent of Spain's fresh produce exports. This percentage rises to 99% within the European Union, Spain's main market, which accounts for 70.5% of the country's total global trade (see accompanying charts).

In 2023, transporters moved 14.5 million tons of fruits and vegetables. Of this total, 87% —about 12.6 million tons— was directed to the EU. This volume is equivalent to more than half a million trucks or an average of over 10,000 heavy vehicles per week.

### Challenges for the Agri-Food Industry

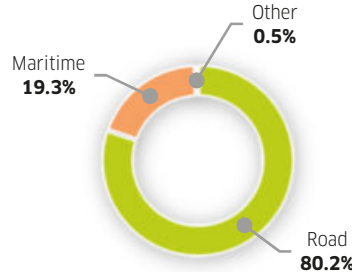
The statistics also reflect the difficulties faced by Spain's agri-food industry, caught in a "perfect storm" caused by adverse weather conditions and rising production costs. Road transport of

**FRUIT AND VEGETABLES DO NOT GET ON THE TRAIN, NOR ON THE PLANE**

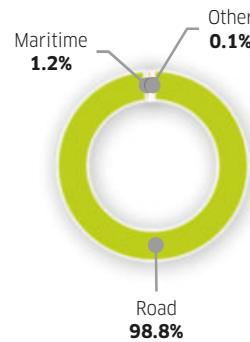
## UNMITIGATED DOMINANCE

Maritime transport, a major player in world trade, irrelevant in the EU.

### WORLD



### EU - 27



Data in thousands of tonnes.  
Source: Secretaría de Estado de Comercio.

fresh produce fell by 3.2 percent last year, driven by a 4 percent drop in exports to the EU, which makes up 80 percent of Spain's trade with the region. Imports, on the other hand, increased by 1 percent, slightly mitigating the overall decline in trade with Europe (-3%).



### Top Destination Markets

A detailed analysis of Spain's fresh produce exports highlights the leading destination countries:

- Germany: Over 3.2 million tons, representing 31.7% of Spain's exports to Europe.
- France: 2.2 million tons. Including

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imports, total trade with France exceeded 3.31 million tons, making it Spain's top trading partner, narrowly ahead of Germany, with 3.30 million tons of combined imports and exports.

- Portugal: More than 900,000 tons in 2023.

Together, these three countries account for over 6.3 million tons, representing 62.1 percent of Spain's fresh produce exports to the EU.

#### Maritime Transport's Limited Role

The second most-used mode of transport is maritime, which accounts for 19 percent of Spain's total fresh produce exports, moving nearly 3.5 million tons in 2023. However, within the EU, maritime transport plays a minimal role, representing just 1 percent of shipments.

#### Rail and Air: Marginal Players

Rail and air transport remain minor modes, acting as mere "silent spectators." Rail transport collapsed by 60 percent in 2023, with volumes dropping to under 14,000 tons. In contrast, air transport increased by 22.1 percent, reaching over 64,200 tons.

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Freight forwarders are collaborating more with shipping lines to secure space and equipment.

## SUPPLY CHAIN | FREIGHT FORWARDERS

# ENDLESS GROWTH

## FREIGHT FORWARDERS SPECIALIZING IN REEFER TRANSPORT NAVIGATE CHALLENGES CAUSED BY VESSEL DIVERSIONS AROUND THE CAPE OF GOOD HOPE AMID THE RED SEA CONFLICT

The reefer business remains attractive for freight forwarders. The growing demand for temperature-sensitive perishable goods, such as food and pharmaceuticals, shows no signs of slowing down, according to industry sources. “The ability to maintain the cold chain and ensure product quality remains a significant competitive advantage,” notes one source.

Moreover, profit margins in refrigerated transport are higher than in dry containers “due to the specialization required and the additional services that can be offered.” In a sector crowded with competitors, “the technical knowledge and experience needed for managing reefer transport continue to make this activity both appealing and challenging,” they add.

Like general maritime transport, reefer operations are suffering from the fallout of the Red Sea conflict. Diverting vessels via the Cape of Good Hope “has increased

transit times and operating costs.” As a result, “certain goods, particularly refrigerated items like fruit, are no longer being exported to some destinations due to longer transit times.”

Alternative ports “have experienced additional congestion, making efficient cargo management more difficult.” Another consequence has been the increased scarcity of refrigerated containers and suitable equipment, “affecting the ability to meet delivery deadlines.”

In some Spanish ports, such as Barcelona, which typically receives fewer reefer units than needed for export, “the increase in transit times and the rerouting of vessels—and consequently transshipment hubs—has created new challenges for equipment availability and led to supply issues.”

Like dry cargo, reefer shipments face space shortages, though with “nuances on

specific routes,” the industry points out. For services to Latin America, for instance, “reefer cargo has been and continues to be prioritized,” since refrigerated containers are essential for fruit campaigns in that region. Overall, “space shortages have affected both dry and refrigerated containers. However, the constant demand for perishables has exacerbated the situation for reefers, which cannot afford delays as dry cargo can. Space issues can lead to more significant disruptions.”

The Red Sea crisis has also driven up reefer transport rates, which “have seen significant increases, sometimes more pronounced than for dry containers due to the scarcity of specialized equipment and the need to maintain the cold chain during longer diversions.”

Freight forwarders are tackling the challenges of Cape of Good Hope diversions with measures such as planning shipments

more precisely to minimize delays, working closely with shipping lines to secure space and equipment, and negotiating more flexible terms. They are also implementing advanced cargo tracking and management systems to improve visibility and control during transit, as well as “advising clients on risk mitigation and offering as many alternatives as possible to navigate disruptions caused by vessel diversions,” among other strategies.

The situation has led to a shift towards air freight for “some critical shipments, particularly high-value or highly pe-

### PORTS MUST CONTINUE INVESTING IN IMPROVEMENTS TO MAINTAIN SERVICE QUALITY

ishable goods, to avoid quality loss.” However, air transport “is not a widespread solution due to the high costs associated with this mode.”

Industry sources highlight that major Spanish ports “are well-equipped to handle refrigerated containers, with sufficient power connections and cold storage capacity.” Nevertheless, “ongoing investment in improvements and expansions is crucial to maintaining services.”

Regarding the border inspection reform recently announced by the government,

Certain critical shipments have been shifted to air transport.



“we hope it will reduce redundancies and delays that currently hinder cargo flow.” Efficient inspection processes are “vital for the competitiveness of our operations, as unnecessary delays impact the supply chain.” The sector calls for “swift and well-coordinated implementation to achieve tangible results.”

### Continuous Service Improvements

Freight forwarders continue to enhance their reefer services, demonstrating the sector’s vitality. For example, **Transped** has obtained the new GDP certification for the international transport and distribution of active pharmaceutical ingredients and human-use medicines. This certification “reinforces the company’s commitment to supply chain excellence,” according to the **Grupo Alonso** subsidiary. The GDP (Good Distribution Practices) certification is an internationally recognized standard ensuring that companies involved in transporting and distributing pharmaceuticals comply with strict regulations and guidelines to maintain product integrity and patient safety.

Meanwhile, **Grupo Rhenus** recently strengthened its **Rhenus Fresh** service for perishable goods in Southern Europe and the Mediterranean trade by adding a specialized team in Spain. Additionally, the German multinational announced the creation of an expert team under Rhenus Fresh to manage the transport of fresh goods between China, Europe, and Latin America.



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ALCAMPO

## SUPPLY CHAIN | LOGISTIC OPERATORS

# BOILING POINT

COLD CHAIN LOGISTICS IS COMPLEX, DRIVING PRODUCERS AND DISTRIBUTORS TO INCREASINGLY OUTSOURCE TO SPECIALIZED LOGISTICS OPERATORS

Cold chain logistics is one of the most complex activities in the supply chain, due to higher logistics costs and the risk of disruptions along the logistics process. This complexity requires significant investment in the technological equipment of transport vehicles and storage facilities, far exceeding that of conventional or dry goods logistics.

As a result, the transport, storage, and distribution of

temperature-controlled products are increasingly entrusted to specialists compared to other logistics niches. This is where logistics operators who focus on cold chain services, or have a dedicated division in this field, play a significant role.

In this context, the cold chain logistics sector is thriving, with a growing trend in volume and considerable potential for growth in specific niches, such as frozen goods.

Facility operated by ID Logistics for Alcampo with 25,000 m<sup>2</sup> of refrigerated storage.

## Strategic Partnerships and Expansions

One of the most notable operations in recent months is the collaboration agreement between STEF Iberia and Montfrisa. This partnership strengthens the French logistics operator's national network in the Iberian Peninsula. According to the company, this agreement will allow them to better respond to the evolving frozen food market in Spain.

Montfrisa is a key player in frozen food transport and logistics. The century-old company operates a fleet of 65 transport vehicles and has four cold logistics platforms, with a combined capacity of 60,000 pallets, located in Madrid, Valencia, Barcelona, and Pontevedra (Galicia).

STEF Iberia also recently expanded its network in the

community of Castilla y León by acquiring Grupo Centeno, which includes Frigoríficos Fernández Centeno and Congelados Villanubla. The acquisition included a warehouse near Valladolid and adjacent land for future growth, along with a fleet of 16 transport vehicles. This deal adds to previous acquisitions, such as Enaboy Castilla in Castilla y León and Grupo TTC in Galicia.

## New Logistics Platforms

Ontime is constructing a new temperature-controlled and frozen food logistics platform in the Technology and Logistics Park of Noblejas (Toledo).

The platform will cover 51,000 square meters and feature cold storage facilities for both negative and positive temperatures, totaling 25,000 square meters, along with dry

**ONTIME WILL ADD 25,000 M2 OF COLD STORAGE TO ITS NOBLEJAS FACILITY**



storage areas for food and other products. Built on a 100,000-square-meter plot, the facility is scheduled to start operations in 2025.

The site allows for an additional 15,000 square meters of expansion. The facility will also include office modules, auxiliary buildings, photovoltaic solar panels, and an access control system.

Meanwhile, ID Logistics manages Alcampo's new mega logistics platform in Illescas (Toledo), which spans 98,500 square meters. The facility recently began its first phase of operations and is expected to be fully operational by the end of summer.

ID Logistics also manages Alcampo's logistics platforms in Alcalá de Henares and Valdemoro (Madrid), which will be replaced by the new Illescas facility. The Valdemoro site, specialized in fresh goods, will remain operational until the integration is complete.

The new Illescas platform, designed in collaboration with Alcampo, will employ 600 people and features 12.2 meter-high facilities with space for 54,000 pallet slots, 228 loading docks, 120 truck parking spaces, and five rest areas for dri-

vers. It includes 65,700 square meters for ambient storage and 25,000 square meters for refrigerated storage.

The platform will serve fresh and dry food products to over 200 stores. It includes a conveyor system capable of handling 12,000 boxes per hour—doubling the current capacity—and uses Autonomous Mobile Robots (AMRs) for pallet movement.



**MILLION INVESTMENT  
IN HAVI'S  
NEW COLD LOGISTICS  
PLATFORM  
IN MADRID**

### Investments in Cold Chain Logistics

HAVI Logistics, whose primary client is McDonald's, will open a new cold logistics platform in San Fernando de Henares (Community of Madrid) in the first quarter of 2025. Segro is investing 50 million in this turnkey project, which will be leased long-term by HAVI.

The facility, built on a 57,000 square-meter plot, will feature a 30,000 square-meter warehouse, with 7,000 square meters for negative cold storage and another 7,000 for positive cold storage. HAVI Logistics will also relocate its Iberian headquarters to this new facility. "With the new location, we will be less than 15 kilometers

(to page 38)

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**SUPPLY CHAIN | LOGISTIC OPERATORS**



SEGRIO

(from page 37)

from the city center, saving twelve percent of annual mileage —equivalent to 6,000 tons of Carbon dioxide emissions avoided over the next fifteen years,” said Rafael Pillado, Senior Manager at HAVI Iberia.

Another sector specialist, Logifrio, is building a new logistics platform in Fuenlabrada (Madrid). The facility, covering 22,000

HAVI will open a cold storage platform in 2025 in San Fernando de Henares.

**LOGIFRIO TO OPERATE A NEW PLATFORM IN MADRID IN 2025**

square meters and with a capacity for 25,000 pallets, is set to begin operations in spring 2025.

Additionally, Logifrio is expanding its network with a new platform near Lisbon, offering 13,000 square meters and capacity for 15,000 pallets, which is nearing completion. Both facilities are going to be focused on temperature-controlled food logistics.



NARVAL

**Sustainability Initiatives**

Transportes Frigoríficos Narval, operating as Narval Logística Frigorífica, expanded its Madrid facility by 1,000 square meters last year, adding space for 481 pallets in a module operating entirely at positive cold temperatures (0 to 2 degrees Celsius).

Narval also upgraded its refrigeration systems by switching from costly synthetic gases to ammonia and glycol, which are

**NARVAL HAS GOT BEHIND A NEW SYSTEM FOR REFRIGERATION**

more economical and efficient. This upgrade allows for better organization of freezing chambers, improving capacity and quality for various temperature ranges.

Narval has a positive cold module in its Madrid warehouse.

In line with efficiency and sustainability goals, Logicor has completed the installation of a photovoltaic plant at its 6,000-square-meter facility leased to Cronofrio located in Palol de Revardit (Girona).



Rueil-Malmaison, France, May 30, 2024

The Vector® HE 17 temperature - controlled trailer refrigeration unit is now available, adding to Carrier Transcold's Vector High Efficiency (HE) range. Offering total versatility for all trailer applications, this new equipment offers cooling power in excess of 16 kW, as well as a significant reduction in fuel consumption and noise levels.

Carrier Transcold is part of Carrier Global Corporation (NYSE: CARR), a global leader in intelligent HVAC and energy solutions.

By integrating advanced inverter technology with the proven all-electric E-Drive architecture, the Vector HE 17 sets a new benchmark for Total Cost of Ownership (TCO) and performance in its category. It offers excellent cooling capacity, reduces fuel consumption by up to 30% and lowers noise emissions by 6 dB, for a more than 50% reduction in sound perception compared to the Vector 1550.

"The Vector HE 17 is positioned as a versatile solution, perfectly suited to long-haul trans-

port and urban deliveries, providing our customers with access to a more efficient and sustainable trailer solution," said Victor Cal-

Carrier Transcold's Lynx Fleet digital platform, which combines refrigeration unit data with machine learning. It helps customers make faster, data-driven decisions and helps improve the effectiveness, efficiency, and sustainability of their supply chains.

The launch of the Vector HE 17 is another milestone in Carrier Transcold's journey, contributing to the environmental, social and governance objective (ESG) to help customers avoid more than one gigaton of greenhouse gas emissions by 2030.



vo, Vice President and General Manager of International Truck & Trailer at Carrier Transcold.

The Vector HE 17 also builds on the proven strengths of the Vector HE 19 model: a hermetically sealed compressor and economizer that increase the efficiency of the machine. This system offers greater efficiency, reduces the risk of refrigerant leaks and significantly decreases fuel consumption, thanks to inverter technology, which constantly adapts the compressor speed to meet cooling demand.

In addition, the equipment incorporates a telematics box that ensures compatibility with



Vector® HE 17 Trailer Refrigeration Unit  
+ Info



Carrier's Environment, Social  
and Governance Goals



SUPPLY CHAIN | COLD STORAGE

# THE MOMENTUM CONTINUES

THE GLOBAL REFRIGERATED STORAGE INDUSTRY CONTINUES EXPANDING ITS LOGISTICS ASSETS AND INTEGRATION OPERATIONS

Members of the Global Cold Chain Alliance (GCCA) currently own or manage 209 million cubic meters of refrigerated warehouse capacity, according to data published last April. The world's top 25 companies operate assets totaling 189 million cubic meters, 17 million more than the previous year, driven by mergers, acquisitions, and the opening of new facilities.

"We predicted that uncertainty in 2023 would slow investments in the sector, but once again, the cold chain has proven resilient in the face of adversity," said Adam Thocher, Senior Vice President of Global Programs and Perspectives at GCCA. He also highlighted that members "have continued to build and expand their networks worldwide."

In this regard, Thocher affirmed that "the cold chain industry continues to see strong demand, with ongoing momentum to invest in sustainable infrastructure in both developed and developing economies."

Lineage Logistics remains the industry leader, with nearly 84 million cubic meters of refrigerated storage capacity, having completed over 110 acquisitions since its founding in 2012. The giant has expanded its footprint in recent months with new

cold storage facilities in Hazleton, Pennsylvania (USA); Foothills, Calgary (Canada); and Tauranga (New Zealand). Additionally, Lineage has entered a joint venture with the Vietnamese operator SK Logistics, which manages two cold storage warehouses in Hanoi.

In second place is Americold Logistics, with over 42 million cubic meters. The operator continues to expand in the United States, with a new facility in Russellville, Arkansas, and the construction of a warehouse in Kansas City, part of a strategic partnership with the railway company Canadian Pacific Kansas City (CPKC).

In late 2023, Americold announced plans, through its joint venture RSA Cold Chain, to build and operate a new facility in the Jebel Ali Free Zone (Jafza) at the Port of Jebel Ali in Dubai. This development is based on its strategic collaboration with DP World.

The top three is completed by United States Cold Storage, which manages 11.4 million cubic meters of refrigerated storage capacity, concentrated in the United States.

NewCold Coöperatief ranks fourth, offering 7.2 million cubic meters of assets. The Dutch operator expanded in the United States with a facility in McDonough, Geor-

Lineage facilities in Richland, Washington (U.S.A.).

## THE 'TOP 25' EXPANDS ITS FOOTPRINT

The largest global operators manage 189 million cubic meters, an increase of 17 million cubic meters compared to the previous year.

RK	COMPANY	CAPACITY
1	Lineage	83,817
2	Americold Logistics	42,228
3	United States Cold Storage	11,483
4	NewCold Cooperatief	7,227
5	Nichirei Logistics Group	5,639
6	Emergent Cold Latin American	4,445
7	Constellation Cold Logistics	4,113
8	Frialsa Frigoríficos	3,560
9	Interstate Warehousing	3,434
10	FreedzPark Logistics	3,264
11	SuperFrio Logística Frigorificada	2,306
12	Vertical Cold Storage	2,189
13	Arcadia Cold Storage	2,132
14	Snowman Logistics	2,111
15	Conestoga Cold Storage	2,007
16	Congebec	1,863
17	Comfrio Inteligencia	1,681
18	Magnavale	1,506
19	Core X Partners	1,438
20	Friozem Logística	1,141
21	Nor-Am Cold Storage	1,129
22	Trenton Cold Storage	970
23	Agri-Norcold	864
24	Commercial Cold Storage	800
25	RLS Logistics	784

Figures in thousands of m3. Source: GCCA.

gia, which has capacity for 85,000 pallets. In Canada, NewCold plans to open a center in Coaldale, Alberta. Additionally, it acquired the refrigerated transport company Karras in Australia last year.

Nichirei Logistics Group, with 5.6 million cubic meters of controlled-temperature capacity, has also expanded operations. Its Chinese subsidiary, Zhejiang Fresh Line Logistics, began operations this year at a warehouse in Zhuji (China).

Emergent Cold Latin America, with 4.4 million cubic meters of refrigerated storage, holds sixth place in the rankings. The company has added new storage plants in Callao (Peru); Apodaca and Villagrán (Mexico); Palín (Guatemala); Talcahuano (Chile); Rio de Janeiro and São Paulo (Brazil); and Panama. Additionally, Emergent Cold acquired Red Polar and Frigorífico Modelo (Frimosa), cold storage companies in Bogotá (Colombia) and Montevideo (Uruguay), respectively.

Constellation Cold Logistics climbed to seventh place in the Top 25, surpassing 4.1 million cubic meters. Frialsa Frigoríficos rose to eighth place, with over 3.5 million cubic meters. Interstate Warehousing and FreedzPark Logistics complete the top ten.



SUPPLY CHAIN | COLD STORAGE

# MORE INVESTMENT IN ASSETS

SPANISH TRADE ASSOCIATION ALDEFE PREDICTS CONTINUED BUSINESS CONSOLIDATION

“We are witnessing a shift in trends. Previously, investments focused on shopping centers, but now they are directed toward logistics,” said Beatriz Valencia Vallepuga, President of the Spanish Association of Refrigerated Warehouses, Logistics, and Distribution (ALDEFE). As an example, she pointed out that “more and more new companies are providing logistics and transport services for e-commerce operations in response to the sector’s evolving needs.”

In her analysis, she emphasized that “investment funds and family offices want to enter the sector to invest, gain volume, and become more efficient and competitive in the market. However, small and medium-sized operators are facing liquidity crises due to rising operating costs caused by labor shortages and high inflation in recent years, costs which often could not be passed on to clients due to high interest rates.” Valencia predicted that “consolidation will occur, but both large companies and SMEs should be maintained, as they serve different types of clients with specific needs.”

This dynamism in refrigerated logistics is reflected in the opening of new facilities.

Among those developed over the past year is the cold storage plant launched by Glaciarr 2030, part of the Raimundo Rodríguez Group. It offers over 5,300 square meters of space, with temperatures as low as -25°C and capacity for 10,200 pallet slots, located in the Fahala Industrial Park in Cártama (Málaga).

Mercapacífico Norte also opened a 10,000 square-meter cold storage facility in the industrial park of Pa-

lencia, specializing in octopus, following an investment of 17 million.

Meanwhile, Frialia Logística, which manages over 210,000 cubic meters of refrigerated storage in Galicia, is expanding its Mos facility to add 25,000 cubic meters of storage for fish and seafood, with an investment of around €6 million.

### Major Retail Projects

The large-scale distribution sector is also developing various projects. Lidl has opened its largest warehouse in Andalusia this year on a 132,000 square-meter plot within the Industrial, Technological, and Innovation Area (CITAI) in Escúzar (Granada), following an investment of 88 million. This complex includes 20,500 cubic meters of cold storage chambers, 6,000 square meters of specialized freezing floor space, and 139 loading and unloading docks.

Similarly, Mercadona has invested €24 million in a new 15,200 square-meter refrigerated products warehouse, an expansion project that began at the end of 2022. Another logistics block that saw improvements over the year was the Vitoria facility, where €4 million was invested to expand the fish warehouse.

Aldi has also launched new logistics platforms in Miranda de Ebro (Burgos) and Sagunto. The former includes 12,500 square meters of cold storage chambers, with capacity for over 5,000 pallets, while the Sagunto facility features

4,300 square meters of temperature-controlled storage for 2,750 pallets.

BonÁrea continues to develop its logistics platform in Épila (Zaragoza), which will require a total investment of €400 million, half of which has already been executed. The complex features a 94,000-square-meter refrigerated warehouse with various temperature regimes based on product conservation needs.

Grupo Hermanos Martín, which operates the Supermercados Mas chain in Andalusia, has also inaugurated a new logistics center on a 130,000 square-meter plot in Guillena (Seville), including 14,000 square meters of refrigerated and frozen storage rooms.

Gadisa, through its subsidiary Pescamar, is investing approximately 5 million in a 4,000 square-meter facility located in the inner dock of the Port of A Coruña.

Lastly, Grupo Cuevas opened its new 3,500 square-meter distribution platform for fresh fruits and vegetables in the San Cibrao das Viñas Industrial Park (Ourense) in February. The facility, named Frunatur, is 2,100 square meters larger than its previous site and includes ten loading docks.

## ROBUST GROWTH

The sector’s total revenue grew by 58.6% between the first quarter of 2022 and the fourth quarter of 2023, rising from €66.25 million to €112.9 million. This reflects “robust growth that highlights the sector’s expansion and strengthening as a whole,” according to Marcos Badenes, ALDEFE’s Secretary General.

However, ALDEFE President Beatriz Valencia highlighted the challenges facing cold logistics and food distribution “due to rising operating costs and the growth of private label brands, which now account for nearly 50% of the market and pressure margins and revenue for those in the supply chain.”

She also pointed out the challenge posed by the EU agreement to eliminate fluorinated gases by 2050, noting that “more than 90% of retail outlets and cold storage facilities in Spain use these gases.”

ALDEFE, in collaboration with AENOR, is working on solutions to facilitate the transition to more sustainable refrigeration systems without requiring a complete overhaul of existing facilities, proposing the adoption of A2L gases with lower global warming potential.

113  
MILLION  
INVOICED  
ALDEFE  
COMPANIES



ALDEFE

SUPPLY CHAIN | COLD STORAGE

# PHARMA MAKES A STRONG ENTRANCE

PHARMACEUTICAL AND HEALTHCARE STORAGE IS ONE OF THE FASTEST-GROWING COLD CHAIN LOGISTICS SPECIALTIES

The global pharmaceutical storage market is expected to generate revenues exceeding 111 billion in 2024 and surpass 154 billion by 2029, according to a report by consultancy firm Mordor Intelligence. The forecasted annual growth rate for this market is an average of 6.82%, the report indicates.

Pharmaceutical manufacturers worldwide are expanding their production capacity and operations, leading to an increased need for logistics services to store raw materials and finished products. Outsourcing pharmaceutical storage services can reduce logistics costs by around 12%, inventory costs by 8%, and fixed asset logistics costs by 20%.

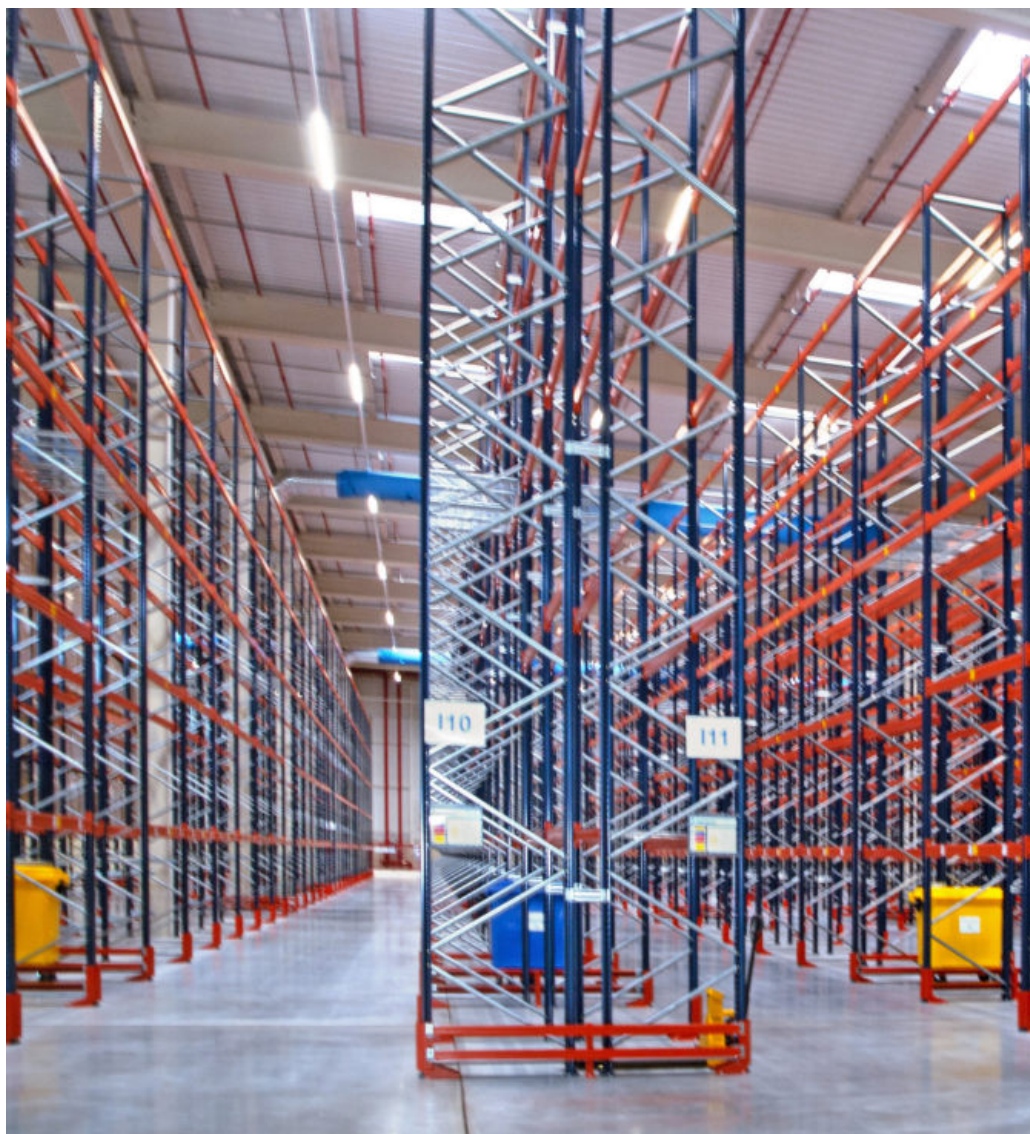
The report highlights that the main challenges facing pharmaceutical supply chain management include real-time visibility, reliability, and inventory management. Given the increasing complexity of supply chains for pharmaceutical companies, certain functions are being outsourced to storage service providers, the report states.

## Key Developments in Spain

One of the most notable developments in pharmaceutical logistics in Spain in recent months has been led by Alloga, the logistics operator of Alliance Healthcare specializing in pharmaceutical and healthcare logistics. In May, Alloga inaugurated the first phase of its new logistics center in Illescas (Toledo).

The company launched an initial warehouse covering 21,000 square meters with 26 loading and unloading docks. A second, fully automated facility is currently under construction and is expected to open in the first quarter

Inauguration  
of Alloga's  
logistics center  
in Illescas.



of 2025, according to company representatives.

## Temperature-Controlled Storage

With this opening, Alloga gains increased storage availability for healthcare products, especially those requiring low-temperature storage between 2°C and 8°C, and medium-temperature storage between 15°C and 25°C. The combined capacity of both facilities for medium-temperature logistics will be 106,600 pallets, while low-temperature capacity will reach 4,100 pallets.

A few months ago, DSV obtained the ISO 13485 certification for the storage and distribution of medical devices at its Cabanillas III logistics center. This logistics center, which specializes in pharmaceutical storage, also holds an operating license for the distribution of hu-

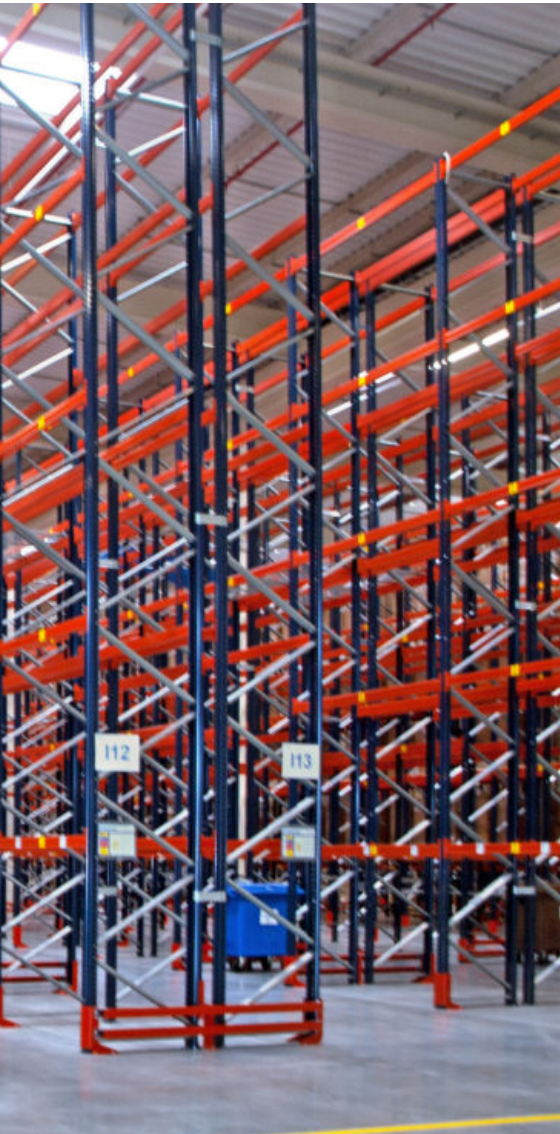
man-use medicines, granted by the Castilla-La Mancha Department of Health in 2022. The license covers the conservation and supply of human-use medicines with marketing authorization in European Economic Area (EEA) countries.

## Cofares Expands Its Logistics Network

Cofares, the Spanish Pharmaceutical Cooperative Society, continues advancing its roadmap as part of a logistics modernization, upgrading, and expansion plan initiated in 2021. The master plan aims to have a warehouse within one hour of every pharmacy in Spain. Last year, the company invested more than 23.5 million in this initiative, a 14.5% increase compared to 2022.

As part of this plan, the company opened logistics centers in Linares (Jaén) and Ourense last year. This sum-

**12%**  
**REDUCTION**  
**IN LOGISTICS COSTS**  
**THROUGH**  
**OUTSOURCED**  
**PHARMACEUTICAL**  
**STORAGE**



mer, it added a new logistics center in Onda (Castellón), representing an investment of 12 million. The new facility spans 7,900 square meters and can manage over 27,000 product references and 10,000 daily lines, with a load capacity for up to 14 transport routes simultaneously.

Cofares also plans to open a new logistics center in Tarragona in 2024, with capacity for 25,000 references, and to launch a new warehouse in Zaragoza in 2025, with an investment of 12 million. These initiatives are complemented by ongoing improvements, expansions, and modernizations of existing facilities. By the end of 2024, Cofares' logistics network

### COFARES IMPROVES AND EXPANDS ITS LOGISTICS CENTERS

will comprise 48 centers and logistics platforms.

#### Movianto's Major Investment

Meanwhile, Movianto, the Iberian subsidiary of Walden Group, launched a new 32,000-square-meter logistics platform in Numancia de la Sagra (To-

ledo) last year. Dedicated to providing logistics services to the pharmaceutical industry, the facility represents an investment of 38 million.

The new platform has enabled Movianto to increase its storage capacity by 75% for products requiring temperatures between 15°C and 25°C, and to double the space for goods stored between 2°C and 8°C. The fully automated facility can accommodate up to 35,000 pallets in temperature-controlled conditions.

Alloga is  
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Healthcare's  
Pharmaceutical  
Logistics  
Operator.



ALLOGA

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### New logistics area

Port Tarragona is investing more than 30 million euros to create a logistics zone of over 900,000 m<sup>2</sup> within the port area to boost maritime traffic and economic activity in the region.

Logistics at the service of people

SUPPLY CHAIN | E-COMMERCE

# ONLINE SALES STABILIZE

E-COMMERCE FOR GROCERIES ACCOUNTS FOR 4.8% OF TOTAL SALES, WHILE HYBRID SHOPPING REACHES 22.3%, ACCORDING TO SUPERMARKET ASSOCIATION ASEIDAS

Online grocery shoppers represent 4.8% of the total this year. The share of grocery e-commerce buyers has stabilized compared to the previous year, though it has slightly decreased from the 5.8% and 5.9% recorded in 2021 and 2022, during the height of the pandemic.

Compared to pre-pandemic levels, online grocery shopping remains significantly higher, according to the latest “E-commerce Observatory in Food Retail”, produced by the Spanish Association of Distributors, Self-service, and Supermarkets (ASEIDAS) in collaboration with the Complutense University and the Autonomous University of Madrid.

Meanwhile, hybrid or omnichannel consumers —those who combine both online and in-store grocery shopping— represent 22.3% of the market, reflecting a decline of about 4.9 points from the previous year. The peak of hybrid grocery sales occurred in 2022, reaching 33.2%, according to the report. The main beneficiary of this shift has been in-store grocery shopping, which increased from 60.9% in 2022 to 72.9% in 2024.

## Fresh and Frozen Products Lag in Online Sales

By product type, fresh and frozen goods have experienced an even steeper decline in online sales compared to packaged foods. Specifically, 43 percent of consumers never buy fresh products online, while 49% never purchase frozen products online.

While fresh products are the category that most hinders online grocery shopping, the study notes that not all fresh items pose a barrier. Fruits and vegetables, cold

cuts, and cheeses are more accepted, while bakery items, pastries, and especially fish and seafood generate greater distrust. This is likely due to their shorter shelf life and the need for rapid transport and strict cold chain maintenance.

60.3%

**OF SPANISH CONSUMERS HAVE NEVER PURCHASED GROCERIES ONLINE**

## Key Barriers and Comparisons

Food sales lag significantly behind other sectors in e-commerce. According to the ASEIDAS report, 60.3% of consumers have never purchased groceries online, 31.2% have done so occasionally, and 8.5% frequently. In contrast, 34.2% of consumers buy fashion items online, and 23% shop online across general markets.

The ASEIDAS barometer highlights that the main advantage of online shopping is convenience, particularly for large or heavy purchases, such as stocking up the pantry

Online Grocery Shoppers Represent 4.8% of Total Consumers.



Grocery Sales Still Lag in E-commerce.

before or after vacations. This theory is supported by the consistently larger shopping carts in online transactions, according to the report.

The study also identifies the barriers to online grocery shopping. These include the



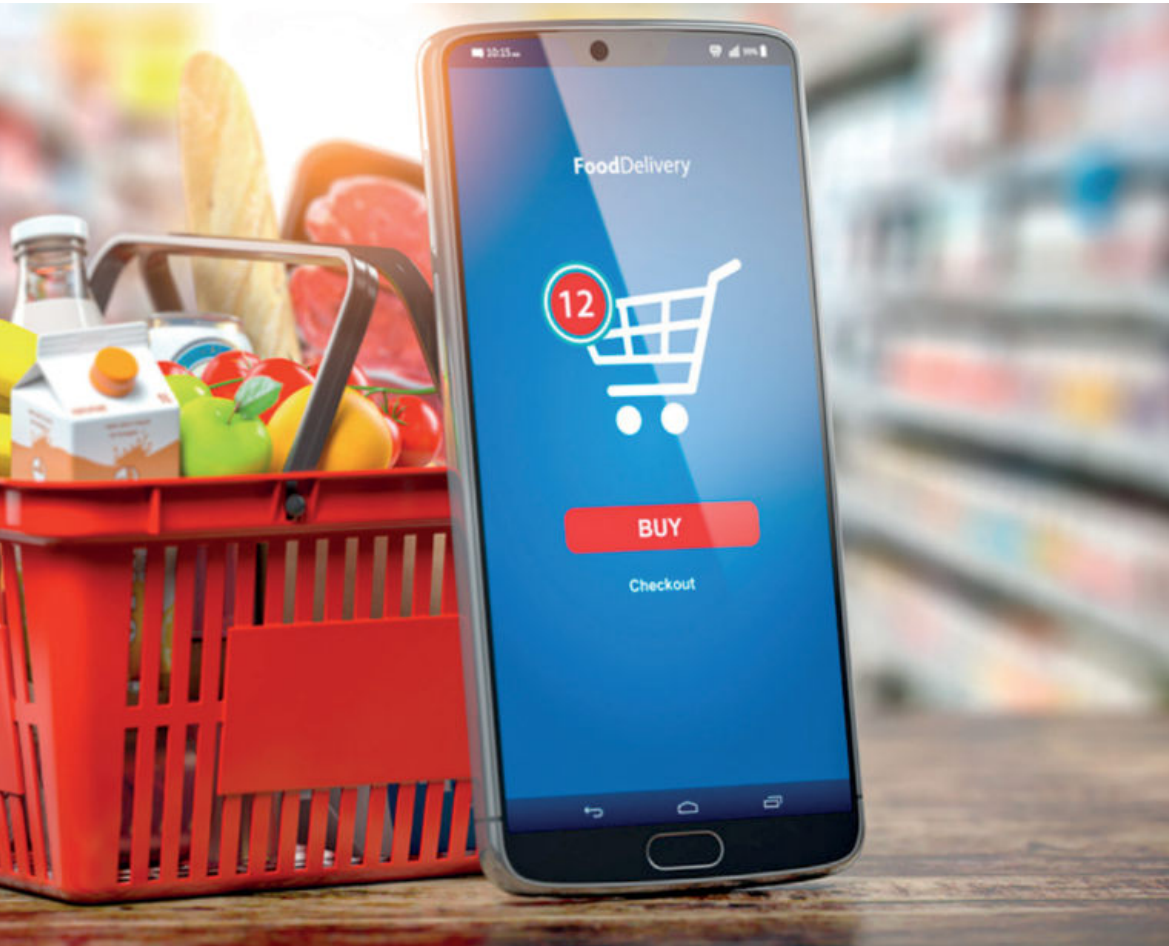
preference to see and inspect products personally, selecting fresh items based on in-store availability, choosing the desired ripeness of fruits and vegetables, and checking expiration dates.

## Factors to Encourage Online Grocery Shopping

The observatory examines factors that could encourage more consumers to shop for groceries online. These include free shipping, a website that helps reliably select fresh products (appearance, ripeness, expiration date), and the option to pay after verifying that the delivered products meet expectations.

In summary, distrust toward fresh products remains the primary barrier to online grocery shopping. Clear delivery times and shipping costs are highly valued. Additionally, having product images on the website and a clear view of the virtual cart contents and total cost are crucial factors when selecting an online provider.

ASEIDAS



temperature service as a key growth driver for the company. Last year, Seur Frío recorded a 15 percent increase in managed deliveries, matching the double-digit growth of the previous year.

In 2023, Seur Frío averaged 7,000 deliveries per day, up from 6,100 the previous year. To handle this growth, the company

**DELIVERY TIMES AND SHIPPING COSTS ARE KEY FACTORS FOR ONLINE SHOPPING**

has expanded its dedicated fleet to over 400 vehicles for both long-distance and local deliveries. Additionally, 80 of the company's facilities are equipped with cold storage.

Seur Frío primarily transports food products, including fresh meats, fish, seafood, ready-to-eat meals, dairy products, pasteurized beverages, and processed foods.

80

OF SEUR'S WAREHOUSES ARE EQUIPPED WITH REFRIGERATION FACILITIES

**Seur Frío: A Market Indicator**

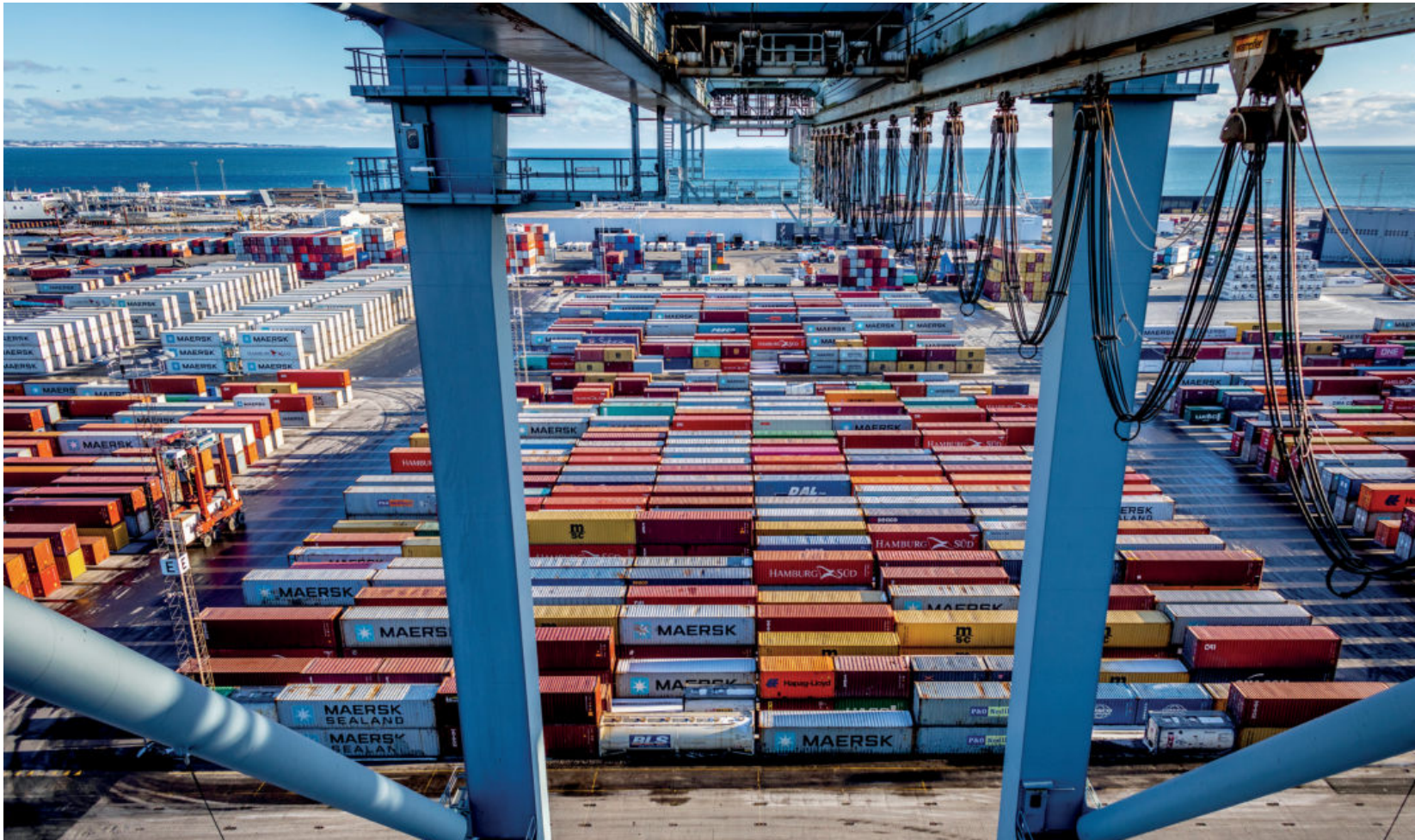
Parcel companies specializing in temperature-controlled deliveries provide a reliable indicator of the state of refrigerated e-commerce.

Seur has consolidated its controlled-

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The growth of the refrigerated container market is a constant feature at port terminals, which are increasingly dedicating more space and investment to handle these types of containers.

## SUPPLY CHAIN | MARITIME TRANSPORT

# A CAPACITY CHALLENGE

THE REEFER MARKET WILL DOUBLE IN SIZE WITHIN SIX YEARS TO HANDLE OVER 7 MILLION TEUS AMID E-COMMERCE GROWTH AND TRADE ROUTE EXPANSION

The total number of refrigerated containers is expected to exceed 7 million TEUs by 2030, according to industry forecasts, with an estimated annual growth rate of 8.8% over the next six years. In 2023, the global market size reached 4 million TEUs amid a scenario experiencing significant growth driven by the increasing demand for pharmaceuticals, expanding trade routes, the booming e-commerce industry, and advances in real-time tracking technology, as highlighted by consultants specializing in this segment of liner shipping.

The main challenge facing shipping lines and logistics operators in the coming years is distributing the appropriate number of refrigerated containers across all geographic regions year-round.

The current market exhibits significant imbalances between imports and exports in key food and beverage exporting regions, such as South America and Central America, and importing regions like China and Europe.

Additionally, refrigerated cargo, such as fresh produce, is highly seasonal, further complicating capacity

planning, according to operators consulted.

Adding to these challenges is current port congestion, particularly in the U.S. and Europe, worsened by the Red Sea crisis, which is slowing the circulation of refrigerated containers. As a result, the shortage of refrigerated containers in exporting regions remains at last year's levels, and the industry anticipates continued upward pressure on reefer container rates.

### Strategic Importance of the Reefer Market

The refrigerated container market remains strategic

for the global transport of temperature-sensitive products, including perishable foods and pharmaceuticals. These containers ensure that fruits, vegetables, meats, seafood, and pharmaceuticals maintain their quality and efficacy during long-distance transport.

One of the key drivers of global market growth is the rapid rise of the pharmaceutical industry, which has profoundly impacted the reefer container market.

Industry sources explain that "with an aging global population and increased health awareness, there is greater demand for phar-

# 7

MILLION TEUS  
IS THE PROJECTED  
VOLUME OF THE  
REEFER MARKET  
IN 2030

maceutical products, many of which are temperature-sensitive." The transport of vaccines, biological products, and other healthcare goods requires precise temperature control to keep their efficacy, "driving the need for advanced refrigerated container solutions," says an executive from a shipping line specializing in reefer logistics.

### THE RISE OF THE PHARMACEUTICAL INDUSTRY HAS INCREASED SHIPMENT VOLUMES

Furthermore, the growth of e-commerce has further accelerated the demand for refrigerated containers, according to consultants.

#### E-commerce and Trade Route Expansion

The global market is witnessing an increasing num-

ber of consumers turning to online platforms for their shopping, meaning "the refrigerated container logistics sector must adapt to efficiently deliver perishable products." Refrigerated containers help "maintain product quality from the warehouse to the supermarket door," industry sources indicate.

In this context, the expansion of trade routes —facilitated by increasing trade agreements and the opening of new markets— has improved access to a broader range of perishable goods, further stimulating demand for refrigerated containers. Stricter regulations on food safety and pharmaceutical transport are also increasing the need for advanced refrigerated containers, while efforts to reduce the carbon footprint and improve sustainability are leading to more efficient

logistics equipment.

#### Technological Advances and Port Adaptations

These technological advan-

The use of advanced equipment is a consistent trend among the world's leading shipping lines.

and transparency for shippers, with equipment that enables a controlled atmosphere tailored to the transported cargo.



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**RECOVERY OF REEFER TRAFFIC**

The Spanish port system improved its perishable cargo container flows in 2023, with notable increases in Valencia, Las Palmas, Vigo, Gijón, Cartagena, and Castellón.

	2023	%23/22	%23/19	2022	2021
Algeciras	3,391	-2%	+1%	3,464	3,972
Valencia	1,873	+5%	-8%	1,789	2,330
Las Palmas	837	+38%	+44%	608	661
Barcelona	477	-16%	-74%	564	678
Vigo	232	+33%	>999%	175	177
S.C. Tenerife	222	+17%	+8%	189	219
Cádiz Bay	107	+19%	>999%	90	103
Gijón	95	+46%	+7%	65	71
Alicante	80	-24%	-42%	106	98
Cartagena	80	+116%	+186%	37	14
Tarragona	62	-0%	+18%	62	52
Málaga	57	-40%	+111%	94	104
Bilbao	54	+18%	-60%	46	71
Castellón	48	+241%	+225%	14	11
Seville	24	+40%	+57%	17	14
Huelva	8	-17%	-61%	10	14
Santander	5	-27%	>999%	7	12
Almería	4	+77%	+201%	2	2
Vilagarcía	3	-37%	-85%	4	12
Ferrol - San Cibrao	1	-32%	-	1	-
Baleares	1	-21%	-67%	1	4
Marín - Pontevedra	0	+30%	-100%	0	0
Melilla	0	-42%	-95%	1	0
Ceuta	0	+53%	-99%	0	0
<b>TOTAL</b>	<b>7,660</b>	<b>+4%</b>	<b>-12%</b>	<b>7,348</b>	<b>8,620</b>

Thousands of tonnes. 2023, provisional. Source: Puertos del Estado.



Refrigerated Container Storage Area at APM Terminals Barcelona.

SUPPLY CHAIN | MARITIME TRANSPORT

# CHILLED TO PERFECTION

PERISHABLE CARGO GROWS BY 4% DUE TO THE STEADY INCREASE IN REFRIGERATED CONTAINER VOLUMES

Maritime traffic of fruits and vegetables through Spanish ports reached 11.9

million tons in 2023, surpassing the 11.1 million tons recorded in 2022,

according to statistics from Puertos del Estado. Of this total, nearly half —5.4 mi-



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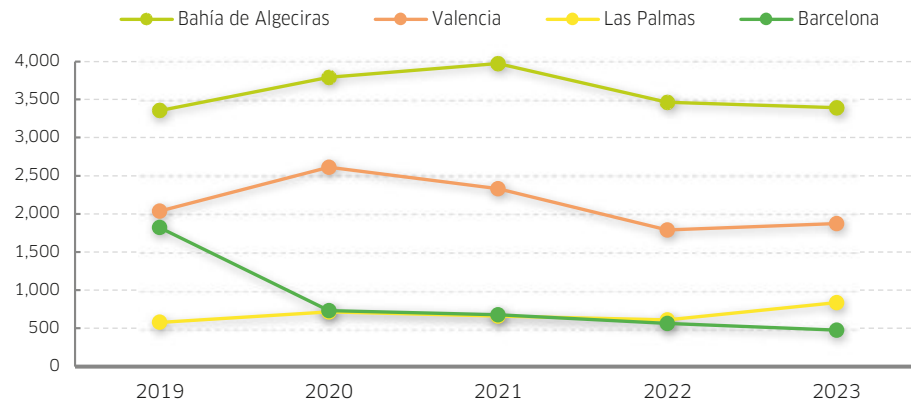


Lifting Global Trade

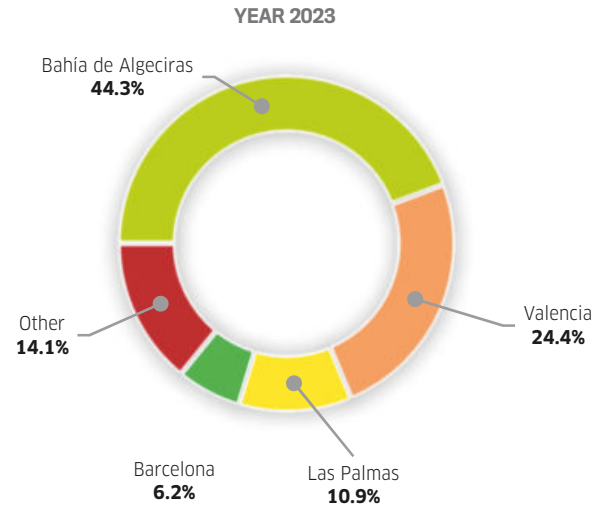


## PERISHABLE CARGO: A HIGH-VALUE BUSINESS FOR SPANISH PORTS

The ports of Bahía de Algeciras, Valencia, Las Palmas, and Barcelona handled 86% of refrigerated container flows in 2023.



Thousands of tonnes 2023, provisional. Source: Puertos del Estado.



lillion tons— was unloaded without transshipment, meaning imports for domestic consumption. These flows primarily rely on containers to reach both national and international markets. In fact, over 7.6 million tons were transported in containers last year, according to indicators from the public agency. This type of traffic grew by 4%, partially halting the decline seen in these flows at Spanish docks since the end of the pandemic.

The main Spanish ports managing refrigerated containers are Algeciras and Valencia. To a lesser extent, Las Palmas, Barcelona, and Vigo also maintain significant market shares, particularly through operations with Maersk, MSC, and CMA CGM, as well as reefer flows managed by Hapag-Lloyd, ONE, and ZIM.

### Global Growth

“The transport of perishable goods maintains an annual growth rate of 3

percent in international flows,” explained an executive from an interoceanic shipping line to this publication. “We are seeing a gradual shift toward container use for certain fruits that, until now, were exclusively transported by conventional vessels, which requires greater logistical capacity,” the executive added.

As a result, one of the primary investments shipping lines are currently making —alongside the

purchase of new vessels— is equipping themselves with the latest technology to ensure that transported products remain in perfect condition throughout the journey.

To achieve this, the sector is focusing on developing and promoting technology on land, particularly in port terminals and distribution platforms, “ensuring the digital future of the supply chain,” stated a logistics operator specializing in perishable cargo.

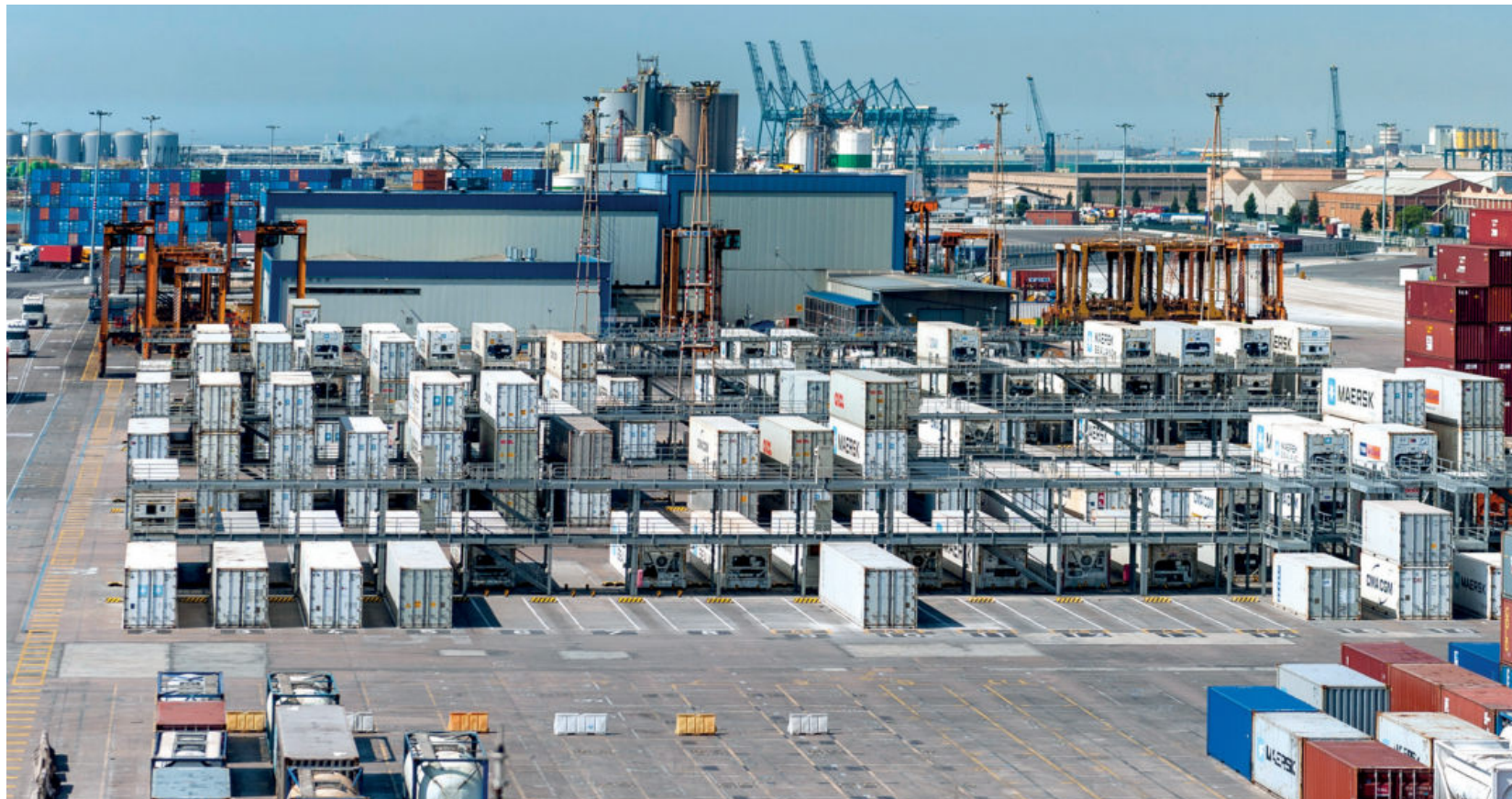
## ALGECIRAS AND VALENCIA LEAD IN PERISHABLE CARGO FLOWS

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Reefer container area at APM Terminals Barcelona facility.

**SUPPLY CHAIN | MARITIME TRANSPORT**

# POWERING THE COLD CHAIN FOR HIGH-VALUE GOODS

SPANISH PORTS BOAST AN EFFICIENT NETWORK OF INFRASTRUCTURE FOR PERISHABLE GOODS TRAFFIC, ALIGNING WITH THE GROWTH OF THE REEFER MARKET

Spanish ports, with more than 85 million square meters of land and storage areas, have a network of cold storage warehouses with a capacity of nearly 2 million cubic meters, supporting the regular shipping lines of both domestic and international carriers.

Alongside value-added logistics, Spanish ports stand out for their extensive connections to ports worldwide, while continuing to maximize investments in border control posts (BCPs), phytosanitary services, and various logistics solutions, according to Puertos del Estado.

Specifically, the terminals at ports such as Bahía de Algeciras, Barcelona,

**2**  
MILLION  
CUBIC METERS  
OF STORAGE  
IN PORTS

Valencia, and Vigo—the main hubs for reefer logistics—have been improving their infrastructure year after year to handle increasing volumes of temperature-controlled goods. These include fruits, vegetables, fish, and meat, as well as other high-value products like liquids, cosmetics, and pharmaceuticals that require specific handling for maritime transport.

Over the years, the Spanish port system has maintained a significant role among European hubs for high-value cargo flows. Thanks to its maritime connectivity, the country has become one of the leading hubs for cold chain logistics, serving importers

and exporters with connections to ports on five continents, aiming to reduce costs and enhance the supply chain competitiveness.

## A Market of High Added Value

Operators agree that the refrigerated cargo market is characterized by high-value services: “It’s a highly demanding market where you cannot rely on trials but on proven facts, and it holds strong growth potential in the coming years.”

## Focus on South America and Africa

Freight forwarders specializing in these flows emphasize that “Spain must maximize its strategy to attract new volumes, particularly from South America and Africa, as our ports should serve as gateways for seasonal products from these regions.”

**ALGECIRAS,  
VALENCIA,  
VIGO, AND  
BARCELONA:  
KEY PORTS**



APM TERMINALS

Operators highlight that “improving facilities is crucial because refrigerated containers need modern warehouses and cargo exchange points for both exports and imports.”

Currently, Spain’s port offerings for refrigerated containers stand out among southern European ports, a business that is continuously expanding to meet the operational needs of shipping lines at Algeciras, Valencia, Barcelona, and Vigo. The terminals at these four ports offer more than 13,500 reefer connections.

#### Expanding Network

For example, in Barcelona, there are more than 3,500 reefer plugs. The BEST terminal, operated by Hutchison, has 2,750 plugs, while APM Terminals Barcelona, owned by Maersk, has 724 connections, which can be extended to a total of 940.

In the Catalan port, priority has been given to reefer container operations, with Maersk’s facility offering a dedicated connection service for the most sensitive reefer cargo, keeping the unit connected until the last moment before loading, with continuous monitoring.

In Bahía de Algeciras, the two terminals offer more than 5,000 monitored

plugs. APM Terminals Algeciras has 4,000 connections, while TTI Algeciras can handle 1,296 reefer containers in its semi-automated yard. These connections are complemented by state-of-the-art facilities providing value-added services for refrigerated cargo. The storage capacity inside and outside the port area exceeds 30,000 pallets, with temperatures ranging from -22°C to +15°C, forming a solid logistics offering to retain this business within the port basin.

#### Connectivity

Meanwhile, the Port of Valencia is emerging as a reefer logistics hub due to its growing maritime connectivity. The harbour has 3,431 reefer connections. Specifically, the CSP Spain terminal offers 1,635 connections, APM Terminals Valencia has 576, and MSC Terminal provides 1,220 dedicated reefer connections. This infrastructure is enhanced by Americold Logistics’ warehouse, which offers 16,000 square meters exclusively for cold chain logistics.

Lastly, Vigo stands out in northern Spain for its perishable cargo flows at the Termavi terminal in the Guixar dock, which has more than 1,300 operational plugs.

### ALGECIRAS LEADS IN PERISHABLE GOODS TRAFFIC

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SUPPLY CHAIN | MARITIME TRANSPORT

# GIBRALTAR STRAIT: A GROWING COLD CHAIN GATEWAY

FRUIT AND VEGETABLE IMPORTS FROM MOROCCO ESTABLISH ALGECIRAS AS SOUTHERN EUROPE'S KEY LOGISTICS LINK IN THE SUPPLY CHAIN



STENA LINE

The Strait of Gibraltar is emerging as a significant center for refrigerated cargo operations, thanks to maritime services connecting southern Spain and North Africa. More than 1,000 trucks per day are processed in the holds of roll-on/roll-off shipping lines transporting goods from Morocco's agricultural regions to Spain and the rest of Europe.

The bulk of this logistics flow from northern Morocco's fields and warehouses is shipped via the route between the ports of Tangier and Algeciras. This logistics bridge handles around 500,000 trucks annually, with agri-food cargo playing a prominent role alongside textile and automotive industry flows from Morocco.

The booming business in the Strait of Gibraltar has attracted the interest of shipping lines.

Thousands of refrigerated trucks pass daily through the Port of Algeciras, connecting to Tangier. In 2023, this route saw a flow of 428,098 UTI (Intermodal Transport Units), reflecting significant growth over the last decade. The market between the European and African shores of the Strait of Gibraltar is creating opportunities for other Spanish ports. Over 16 million tons of export and import cargo flow through this region, mana-

## ALGECIRAS, CÁDIZ, HUELVA, ALMERÍA, MÁLAGA AND MOTRIL, LINKS TO AFRICA

ged by both Moroccan and Spanish transport companies.

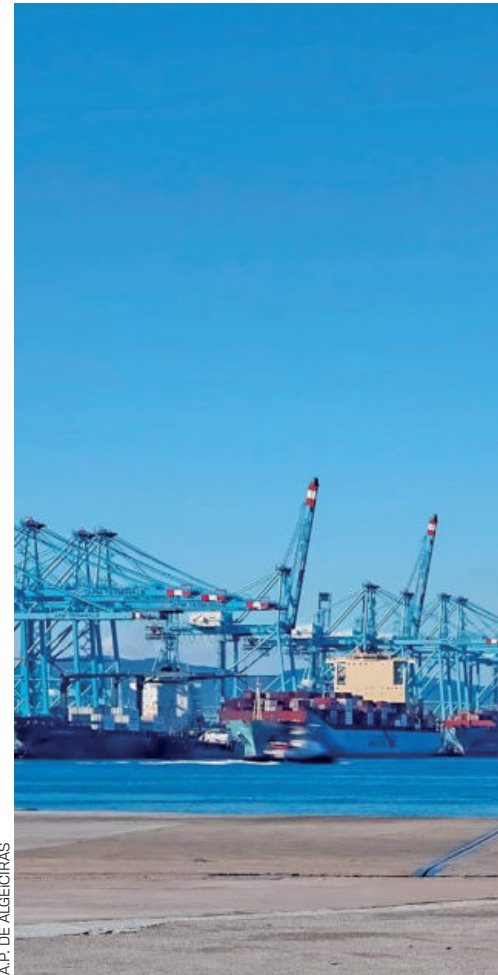
While Algeciras dominates this market, other ports such as Cádiz, Huelva, Almería, Málaga, and Motril are also benefitting, with opportunities to expand their logistics and port activities by increasing their sphere of influence and offering alternative services for cargo on the Iberian Peninsula.

In 2023, Spain imported 459,000 tons of fruits and vegetables from Morocco, marking a 104% increase over the past decade, according to data from the Spanish Institute for Foreign Trade (ICEX).

### Top Imported Products

In terms of volume, the most imported product from Morocco is watermelon, with Spanish companies purchasing 78,400 tons. The second most imported product is peppers, with 77,400 tons. Other key imports include green beans (61,400 tons), tomatoes (57,900 tons), and raspberries (32,300 tons).

Since the EU-Morocco Association Agreement came into effect in 2010, establishing a free trade zone between Medi-



A.P. DE ALGECIRAS

terranean countries, imports of Moroccan fruits and vegetables to Spain have quadrupled, while trade with the EU has doubled.

### Algeciras: A Critical Asset

Given this growth, having strategic assets like the Port of Algeciras is essential for Spain. The Andalusian port operates 24/7, maintaining a connection between Algeciras and Tangier Med in under 90 minutes. This link is crucial for passenger transport and trade between the two continents.

To handle perishable goods arriving in Europe via container and from North Africa, the Port of Algeciras features a first-category Border Control Post (BCP), operating 24/7. This critical point for ensuring EU food safety will expand its inspection capacity by 150%, increasing from 12 to 30 inspection gates.

16

MILLION TONS PASS THROUGH THE STRAIT ANNUALLY



Additionally, the port is working with the Ministry of Transport and Sustainable Mobility to improve road and rail connectivity. Algeciras serves as the starting point for the Trans-European Transport Network (TEN-T) Mediterranean and

104%

**GROWTH**  
IN MOROCCAN  
EXPORTS TO SPAIN  
OVER THE LAST  
DECADE

Atlantic corridors. The extension to Zaragoza will include a future rail motorway to accommodate the increasing flows with Morocco.

Planned road infrastructure improvements include upgrading the southern and northern port access routes, building the Algeciras outer bypass to manage long-distance traffic between the N-340 and A-351/A-7, and expanding the A-7 to San Roque (Cadiz) with an additional third lane.

Half a million trucks cross the Strait of Gibraltar each year.



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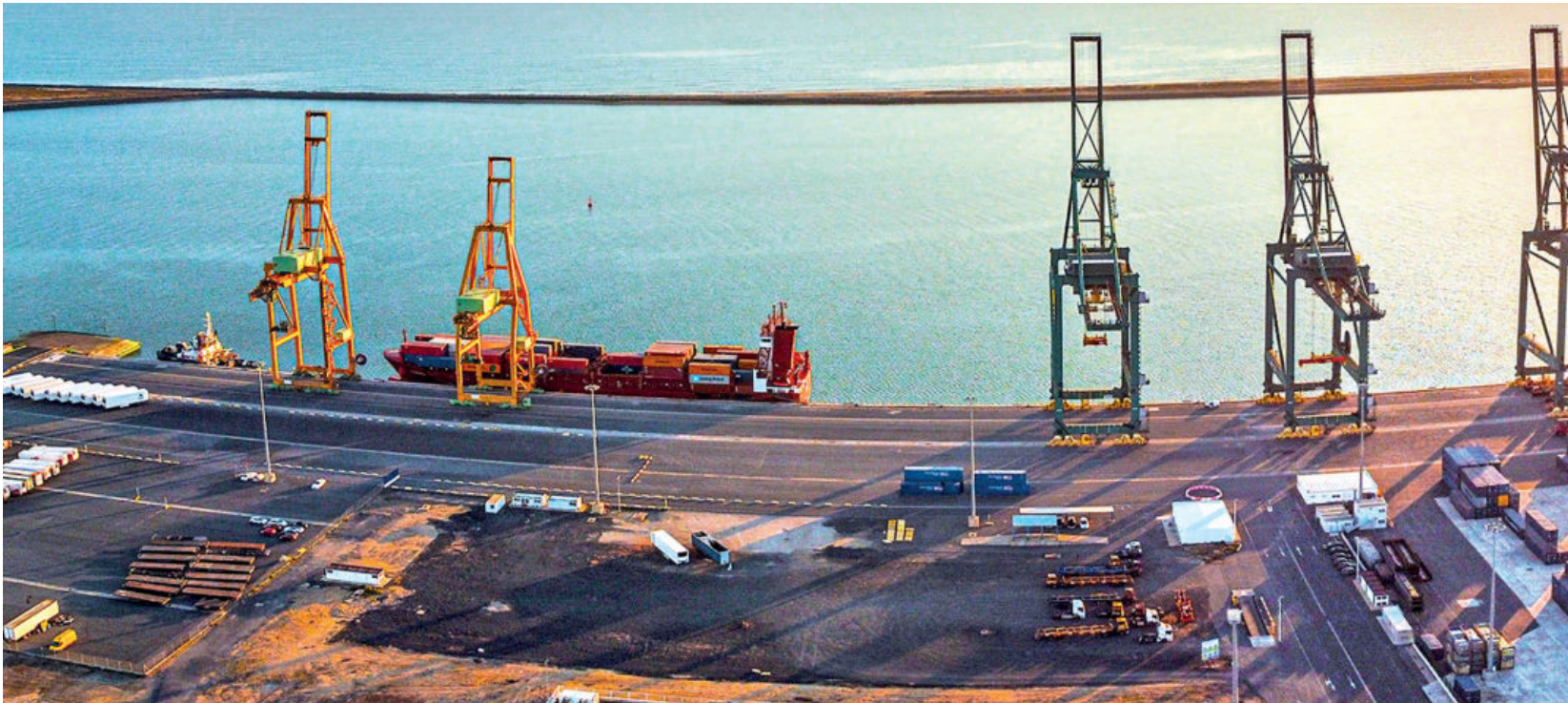
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The South Dock offers growth and new opportunities for cold chain logistics at the Port of Huelva

**SUPPLY CHAIN | MARITIME TRANSPORT**

# HUELVA, THE NEW POWERHOUSE

**FRIPORTSUR'S COLD STORAGE PLATFORM WILL BOOST PERISHABLE GOODS LOGISTICS IN HUELVA WITH A €34 MILLION INVESTMENT**

The Port of Huelva has introduced an innovative element to port logistics with the launch of the new Friportsur logistics center, located at the port's South Dock. This versatile facility is equipped with the latest cold storage technology.

The 'Cold Logistics Hub' at the Port of Huelva is part of a collaborative framework between the Port Authority and Enagás, utilizing the residual cold generated during the regasification process. Specifically, this process takes place at Enagás' Liquefied Natural Gas (LNG) plant in Huelva, which produces cold temperatures as low as -35°C, significantly reducing energy costs by repurposing this cold for the storage facility.

The Friportsur project has been designed as an essential, highly specialized port space for storing and handling temperature-controlled goods.

The facility comprises a set of specialized buildings offering functionality, safety, and comfort, meeting the highest quality standards, according to center representatives.

The warehouses make use of ecological cold sourced from residual cold generated by the Enagás regasification plant, also located in the port. This represents "a key solution for establishing our business at the Port of Huelva," explains Salvador Urbiston-do, CEO of Friportsur.

**Strategic Location and Cutting-Edge Facilities**

The facility spans 32,500 square meters at the South Dock, near the Border Control Post (BCP), the container terminal, and the multimodal rail platform. It supports various temperature-controlled activities such as quality control, cross-docking, repalletizing, and cargo handling.

With a storage capacity of 180,000 cubic meters, the platform includes a dual-temperature chamber for 3,000 pallets and four ra-

pid-freezing tunnels. The center accommodates temperatures ranging from -60°C to chilled storage at -25°C, freezing tunnels at -35°C, and refrigerated rooms between 0°C and 4°C.

**Operational Efficiency and Sustainability**

In addition to significant energy cost savings, Friportsur highlights the facility's direct access to the Border Control Post and the dock. This eliminates the need for additional hauling to the container and roll-on/roll-off terminals in Huelva.

The platform introduces a new logistics concept in Huelva by offering automated high-bay frozen storage and adjacent dual-temperature refrigerated storage.

The facility also enhances cross-docking operations, container consolidation and deconsolidation, and rapid freezing of goods, with the capacity to freeze one truckload of products every 24 hours using its four static freezing tunnels.

Finally, the center provides clients with dedicated areas for palletized cargo handling, palletizing, labeling, strapping, cleaning, and quality control, among other services.

**Investment and Recognition**

Developed in two phases with in-

**3,000**

**PALLETS  
CAN BE  
STORED BY  
FRIPORTSUR**



YILPORT

vestments of 18 million for the first phase and 16 million for the second, the project represents a “clear technological innovation in Spain, unique in its sustainable approach, utilizing alternative energy sources and achieving a 95% reduction in environmental costs,” according to company sources.

### FRIPORTSUR WILL RECEIVE ENERGY FROM ENAGÁS’ LNG PLANT

Friportsur received a grant of 5.6 million from the Andalusian Agency for Innovation and Development (IDEA), co-financed 80% by the European Regional Development Fund (ERDF) for the Huelva project. In February, the Friportsur project was awarded the Environmental Merit



FRIPORTSUR

The facility can freeze a truckload of products every 24 hours.

A large advertisement for Grimaldi Lines. It features a high-quality image of the ship 'ECO VALENCIA', a GRIMALDI HYBRID RoRo, sailing on the open sea. The ship is white with a dark green hull and a red stripe at the bottom. The Grimaldi Lines logo, a blue flag with a white 'G', is visible in the top right corner. The text 'GRIMALDI LINES' is written in a large, white, serif font. Below the ship, the text 'The FIRST GREEN Ro-Ro OPERATOR in the MEDITERRANEAN' is displayed in a bold, white, sans-serif font.

130 Motorways of the Sea and maritime connections

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SUPPLY CHAIN | MARITIME TRANSPORT

# COLD CHAIN TRUSTS IN SHORT SEA SHIPPING

INCREASED SERVICES BETWEEN SPAIN AND MOROCCO SUPPORT GROWING SOUTH-TO-NORTH PERISHABLE GOODS FLOWS, WITH MOST CONNECTIONS CLASSIFIED AS MOTORWAYS OF THE SEA



Refrigerated freight carriers are increasingly confident in short sea shipping, trusting that trailers can be loaded onto ships without risking cold chain disruptions. Confidence is rising, “especially because previous experiences or those of colleagues confirm the safety of the goods during the crossing,” explains Pilar Tejo, Technical Director of the Spanish Association for the Promotion of Short Sea Shipping (SPC-Spain).

SPC-Spain’s regular reports do not break down temperature-controlled cargo separately from general freight. However, “available information shows a certain stability in refrigerated transport volumes on both the Atlantic and Mediterranean coasts, with short sea shipping chosen for these flows,” Tejo adds. Naturally, refrigerated

transport volumes are higher on the Mediterranean coast due to the greater number of services compared to the Atlantic.

The Mediterranean arc hosts connections with Morocco, “supporting significant south-to-north perishable goods flows,” notes Tejo.

## TRAFFIC STABILITY IN BOTH ATLANTIC AND MEDITERRANEAN COASTS

Since trade between Spain and Morocco does not qualify for eco-incentives—which are limited to trade between EU

countries—“all this significant refrigerated transport remains excluded from financial support.”

Companies that benefited from the first round of the eco-incentive program (applications for the second round were submitted but not yet approved at the time of writing) “are generally multiproduct carriers, serving various types of goods, likely including temperature-controlled cargo.” However, among the beneficiaries, “there are no companies specifically focused on this type of transport.”

SPC-Spain is advocating for the inclusion of trade with third countries in the eco-incentive scheme to enable more carriers to benefit from the subsidies. Despite Morocco’s exclusion from these incentives, “we

Previous experiences reinforce confidence in shipping.

are observing significant growth in trade flows with Morocco.”

Since 2009, the first year of SPC-Spain’s statistical reports, freight flows between Spain and Morocco have quadrupled. This dynamism “naturally leads to new services emerging from various Spanish ports” to the North African country.

## Growing Service Offerings

The latest SPC-Spain statistical report for last year highlights a significant increase in services to Morocco, driven by both new routes and increased frequency on existing ones. SPC-Spain identified eight services from the ports of Motril, Málaga, Almería, and Barcelona to various Moroccan ports.

Moreover, seven of these services are classified as Motor-



ways of the Sea due to their frequency —three or more sailings per week. This represents “great dynamism on the supply side, adapting and even anticipating demand growth,” adds SPC-Spain’s Managing director.

**Short Sea Shipping Trends**

Short sea shipping experienced a slowdown last year following record highs in 2021 and 2022 for Spanish port traffic. International roll-on/roll-off (ro-ro) traffic was affected by the overall stagnation in global trade.

In 2023, international ro-ro freight (excluding vehicles transported as cargo) totaled 26.3 million tons, a 5.6 percent decrease from 2022, which saw a historic high of 27.8 million tons, according to an analysis by Transporte XXI of SPC-Spain reports since 2009. However, Spanish ports still surpassed



the 25.7 million tons recorded in 2021.

In addition to general economic conditions, short sea shipping was impacted by the trade suspension between Algeria and Spain, which lasted throughout the year. Although Algeria represents a smaller market compared to Morocco and Italy for Spanish Mediterranean ports, the impact was felt.

Overall, Mediterranean coast traffic declined by 5.9 percent, while Atlantic coast traffic fell by 3.8%. Mediterranean ports continue to handle nearly 9 out of 10 tons of international ro-ro short sea shipping.

Services to Morocco increased significantly last year.

**Market Stability and Growth**

Short sea shipping (including cabotage and bulk cargo) closed the year with an overall decline of 3.9%, totaling 259.5 million tons, according to the latest SPC-Spain report.



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SUPPLY CHAIN | RAIL TRANSPORT

# REDUCING THE CARBON FOOTPRINT

SHIPPERS INCREASINGLY VALUE SUSTAINABILITY IN THE SUPPLY CHAIN, BOOSTING RAIL FOR REFRIGERATED FREIGHT TRANSPORT



TRANSPORTE XXI

The carbon footprint reduction policies adopted by major shipping companies are driving the growth of rail freight flows. One of the fastest-growing sectors is refrigerated freight, primarily food products transported via reefer containers.

At the beginning of this year, 33 weekly trains of reefer containers were operating in Spain. This figure was shared by José Antonio Sebastián, Commissioner for the Atlantic Corridor, during the inauguration of Spain's first intermodal terminal specializing in reefer containers in Madrid last March, developed by Athos Rail.

This new terminal, located in Fuenlabrada, represents "a first step" in a broader intermodal plan designed by

the company. The plan includes additional terminals of this type in the coming years, confirmed Ignacio Domecq Benjumea, CEO of Athos Rail, to Transporte XXI. Domecq also revealed plans for a second, larger terminal in the Cobo Calleja industrial park, also in the southern Madrid area.

The Athos Rail terminal covers 18,000 square meters, with the potential to expand to 27,000 square meters using adjacent plots owned by the Domecq family. The facility features

two 260-meter access tracks and can handle over 300 containers, mainly refrigerated and frozen. The intermodal terminal can operate two trains per day, each carrying 35 to 45 refrigerated and frozen containers.

**33**  
**WEEKLY**  
**REEFER**  
**CONTAINER TRAINS**  
**OPERATE**  
**IN SPAIN**

Athos Rail  
Intermodal  
Terminal in  
Fuenlabrada.

## Synergies and Services

Athos Rail's intermodal business is complemented by Athos Innovaciones Logística, the group's logistics operator specializing in ambient, refrigerated, and frozen food logistics. The logistics operator handles cargo consolidation, deconsolidation, and last-mile deliveries.

Synergy, Hutchison Ports BEST's logistics operator, also focuses on refrigerated rail freight services. The company has established a service connecting the Port of Barcelona with the Noáin Intermodal Terminal in Pamplona (Navarre). This service handles refrigerated and frozen cargo for the agri-food, pharmaceutical, and chemical sectors.

Meanwhile, Maersk has consolidated a refrigerated rail service from the Port of Algeciras to the Madrid-Abroñigal terminal, launched last year. The train, operated by Renfe Mercancías,

offers customs clearance and direct container deliveries to clients' warehouses in Mercamadrid.

This service, meanwhile, complements a previous refrigerated route between Algeciras and the Galician port of Marín, focused on transporting frozen fish. Maersk moves reefer containers with products like frozen goods, fruits, and vegetables among others.

**CoolRail and Other Services**

One of Spain's most established refrigerated rail services is CoolRail, specializing in the export of Spanish fruits and vegetables to Northern Europe.

This "door-to-door" service is operated by Transfesa Logistics and EuroPool System, connecting Valencia with Cologne (Germany), Brussels (Belgium), and Rotterdam (Netherlands) in 48 hours, the United Kingdom in 72 hours, and the Nordic countries in 96 hours.

Additionally, the VIIA rail motorway transports refrigerated export goods from Spain.

About 70 percent of the cargo shipped to the United Kingdom via VIIA is refrigerated, which primarily are fruits and vegetables.

**BIOFUELS IN RAIL FREIGHT**

A major milestone in sustainability was achieved by Maersk, Renfe Mercancías, and Cepsa with a pilot test using HVO biofuel for rail freight transport. The test

a daily train ran this route, moving 5,000 TEUs without incident. The test consumed 160,000 liters of HVO, achieving a 90% reduction in emissions com-

pany plans a similar project for routes in Galicia. Regarding HVO's higher cost compared to diesel, Silvia Oltra, South West Europe and Maghreb HSSE Manager at Maersk, explained that "economies of scale will bring costs down as more trains run and more clients participate."

Julián Mata, Intermodal Market Manager at Renfe Mercancías, added: "The more trains we run, the higher the HVO production, and the lower the cost."

**THE HVO TEST ACHIEVED A 90% EMISSIONS REDUCTION**



HVO pilot test by Maersk, Cepsa and Renfe Mercancías.

covered a 200-kilometer non-electrified route between Algeciras and Madrid. For three months, from July to October 2023,

pared to fossil fuel.

Currently, 80% of Renfe Mercancías' operations use electric traction. Following the pilot's success, the com-

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SUPPLY CHAIN | RAIL TRANSPORT

# SERVING AT THE PLEASURE OF THE TRAILER

RAIL MOTORWAYS EMERGE AS THE IDEAL SOLUTION FOR ROAD HAULIERS TO TRANSITION TO RAIL, BOOSTING INTERMODALITY

Mario Buñuel, General Director of Continental Rail, welcomes the strong commitment by the EU and governments, including Spain, to promote rail freight transport in Europe. “Rail has never received direct subsidies in Spain,” he notes. “Now we have financial aid to renew and expand our fleet through Next Generation Funds and eco-incentives,” he adds.

In this context, the creation of a rail motorway network is essential to boost intermodality. “We have high hopes that this will be the right solution to achieve the growth rail needs,” Buñuel emphasizes.

The strategy of the Ministry of Transport and Sustainable Mobility, in collaboration with Adif, focuses on rail motorways as the primary means to increa-

se rail freight’s market share in the coming years. Under this model, “rail-compatible freight volumes will multiply exponentially,” public authorities predict.

## Collaboration Between Road and Rail

On the road transport side, David Raposo, General Director of Marcotran, supports collaboration between road and rail. “Shipping lines have taken a historic step by embracing intermodality with rail, and we need to do the same,” he states.

Raposo also points out that this is a “great opportunity to transform Spain from a peripheral transport country into a central hub for goods coming from the rapidly growing North Africa.” However, to establish

this network of rail motorways, the sector will face a “two to three-year desert crossing” due to infrastructure upgrades. This impact, expected to exceed 200 million, will be felt over the next few years, warns the Spanish Association of Railway Freight Operators (AEFP).

## AN OPPORTUNITY TO ATTRACT CARGO FROM NORTH AFRICA

The Ministry of Transport and Sustainable Mobility acknowledges that railway network upgrades result in extra costs and delays in the logistics chain, potentially leading to lost contracts and clients. This

discourages shippers from returning to rail after restrictions are lifted, due to concerns about future infrastructure availability. To address this, the ministry is finalizing a new aid system for extraordinary traffic disruptions (SAPET).

## Future of Rail Motorways

Experts welcome this enthusiasm for rail motorways but predict that the logical evolution will favor container transport over trailers due to its “technical and economic advantages.” This shift will likely occur once road hauliers experience rail’s reliability and efficiency, says Andrés Herbada, a member of the Transport and Logistics Commission of the Madrid Association of Industrial Engineers (COOIM).



M. DE TRANSPORTES

The First Iberian-Gauge Rail Motorway is Now a Reality.

Developing a European and national land transport agency to regulate road and rail transport activities with a clear vision of integration is another aspiration to change the industry's trajectory in the coming years.

**A Time for Action**

Spain's first Iberian-gauge rail motorway, connecting the Port of Valencia and Madrid, is now operational. This project, driven by Transitalia and Tramesa in collaboration with Adif and the Port of Valencia, operated by Medway, will remove over 300 trailers per week from the roads during the second half of 2024. Projections aim to double this figure by 2025.

The project represents a 20 million public-private investment. The second phase, extending to Lisbon, will require an additional 20 million. The goal

is to run four trains per week in each direction. Trailers are then loaded onto Grimaldi shipping lines' maritime motorways. This initiative creates a carbon-free corridor between Madrid

and the heart of Italy, reducing CO emissions by transporting trailers by rail and sea.

The second major rail motorway project in Spain is the Algeciras - Madrid - Zaragoza route, with an unprecedented investment exceeding 468 million, according to Adif. The upgrades include increasing clearances for overpasses and tunnels, modernizing sig-

nals, extending station tracks to 750 meters, and improving key infrastructure points.

**Extensive Network Upgrades**

The Algeciras - Zaragoza rail motorway, running between the Port of Algeciras Bay and

€  
468

MILLION  
TO BE INVESTED  
BY ADIF IN THE  
ALGECIRAS-  
MADRID-ZARAGOZA  
RAIL MOTORWAY

Adif's Zaragoza Plaza terminal, will involve work on 43 tunnels and 131 overpasses.

Since January, Adif has been sharing plans with stakeholders, including the Port Authority of Algeciras Bay, Aragón Plataforma Logística, and Rail & Truck for the Algeciras-Zaragoza route; the Port Authority of Seville, Rail & Truck, and Grupo Pantoja for the Seville - Zaragoza route; and the Port Authority of Huelva and Renfe for the Huelva-Zaragoza route.

The Algeciras - Zaragoza route will handle six trains daily (three in each direction) carrying trucks to and from Morocco. Additionally, two daily trains (one in each direction) will operate from Huelva to Zaragoza, transporting trucks to and from the Canary Islands and Huelva's surroundings. The Seville - Zaragoza route will feature four daily trains (two in each direction) serving trucks to and from the Port of Seville and Andalusia. In total, approximately 360 trucks will be transported daily along this corridor.

PORT OF CADIZ BAY

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SUPPLY CHAIN | AIRFREIGHT

# ON THE RISE

AIR FREIGHT OF PERISHABLES AND PHARMACEUTICALS, DEPENDENT ON COLD CHAIN INTEGRITY, SHOWS SIGNIFICANT GROWTH IN RECENT YEARS

The air transport of refrigerated goods continues its upward trend. Perishables and pharmaceuticals are the two main categories shipped via reefer containers in air freight operations.

The value of international goods transported by air in Spain in 2023 reached €50.978 billion, according to data from Aena. Additionally, 17 percent of exports outside the European Union by value were transported by air. The average value per kilogram was €91.9 for exports and €67.7 for imports.

Perishables accounted for 15 percent of total air freight traffic in Spain in 2023, with a value exceeding €500 million, representing about 1 percent of the total. Meanwhile, pharmaceuticals made up 2 percent of the total volume, but their value surpassed €9.685 billion, or around 19 percent of all goods transported by air in Spain last year.

At Adolfo Suárez Madrid - Barajas Airport, Spain's leading air cargo hub, food (perishables) was the primary import category, with 34,105 tonnes handled in 2023, according to the association of air cargo professionals in Madrid, Foro MADCargo.

In imports, perishable products reached 28,588 tonnes last year, marking a 27% increase. In exports, food totaled 5,516 tonnes, reflecting a 3% decline compared to the previous year.

The top export destinations were:

1. Italy – 756 tonnes
2. UAE – 669 tonnes
3. Israel – 627 tonnes
4. China – 396 tonnes
5. Hong Kong – 265 tonnes

For imports, the top five were:

1. Peru – 5,079 tonnes
2. Brazil – 4,013 tonnes
3. Costa Rica – 3,270 tonnes
4. Chile – 3,082 tonnes
5. Mexico – 2,898 tonnes

Pharmaceutical exports from Barajas fell by 16 percent, exceeding 3,000 tonnes, while imports dropped by 21 percent, totaling around 1,000 tonnes. However, compared to pre-pandemic levels in 2019, pharmaceutical volumes in both imports and exports have grown.

34,105

TONNES  
OF PERISHABLES  
HANDLED AT BARAJAS  
IN 2023

### Investment in Barajas

IAG Cargo plans to invest €1.5 million to expand its perishables center at the Barajas air cargo terminal, strengthening

Transport operations of pharmaceutical material in Madrid-Barajas.



IAG Cargo will expand its Barajas hub, which will increase its capacity by 45%.



ning its position in fresh goods transport between Latin America and Europe.

The expansion will increase capacity by 45 percent, adding up to 1,340 square meters of temperature - controlled space for perishables. Equipped with state-of-the-art refrigeration units, the facility will boost handling capacity for fruits, vegetables, meats, and fish.

This development will allow IAG Cargo to ensure optimal cold chain management with 24/7 monitoring and reduce transit times to deliver fresh products in perfect condition.

#### Specialized Centers

In July, FedEx announced the launch of its first European Life Sciences Center in Veldhoven, Netherlands —its sixth globally, following centers in Memphis (USA), Mumbai (India), Singapore, Seoul (South Korea), and Tokyo (Japan).

The one thousand square - meter warehouse offers four temperature-controlled rooms and freezers maintaining temperatures from -80°C to +25°C. The facility operates 24/7 monitoring with separate alarms for each



FedEx Operates Six Global Centers for Airborne Biological Goods

cal. Its Shanghai branch holds IATA CEIV Pharma certification, while its facilities in Barcelona, Madrid, Mumbai, Frankfurt, and headquarters in Kempten (Germany) are GDP-certified.

Demand for CEIV Pharma certification has surged since the pandemic and the increase in environmental disasters and conflicts. IATA reports that many governments and NGOs frequently seeking certified operators for medical shipments, stressing that CEIV Pharma was developed with the World Health Organization (WHO).

### FOOD IMPORTS GREW BY 27% AT BARAJAS IN 2023

temperature zone. In addition to refrigeration, services include specialized packaging, proactive tracking, and value-added services like labeling and reverse logistics.

FedEx's Veldhoven center is GDP-certified (Good Distribution Practices), offering the complete supply chain process for the storage and transport of temperature-sensitive medical products.

#### Pharma Certifications

Dachser recently renewed its certifications for air transport of pharmaceuti-

IBERIA

FEDEX

All things  
great and small



**CONNECTING**  
valenciaport