

**Barcelona
London Day[®]**

**Global Industrial Footprint:
Trends and Opportunities**

Barcelona combines the strength of an industrial engine and a logistics hub



- Barcelona has a diversified and open economy. The city offers an international airport, the port, the trade fair, Zona Franca (logistics, industrial area and a logistics platform), which altogether offer huge potential as a Mediterranean logistics hub
- In 2018, the Catalan territory was the home of approximately 8.600 foreign companies headquarters. The main countries of origin were Germany (13.1%) and the United States (11.7%). Companies such as Nestle, Seat, Basf, Bayer, Henkel, Roche, Sanofi and Novartis have very significant investments in Barcelona
- In 2017, exports from the province of Barcelona reached €54,771.6 million, a new historical record in the past 7 years

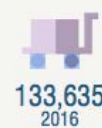
AIRPORT

Barcelona airport

Total passengers



Goods (in tonnes)



Source: Spanish airports and air navigation (AENA)

PORT OF BARCELONA

Traffic (millions)

	2016	2017
Goods (tonnes)	47.6	60.1
Containers (TEU*)	2.2	3.0
Passengers	4.0	4.1

* TEU: Measure of sea transport capacity equivalent to a twenty-foot container
Source: Barcelona Port Authority

Exports (in millions of euros)

	2016	2017*	% OF SPAIN 2017
Barcelona	51,189.5	54,771.6	19.8%
Catalonia	65,142.1	70,828.7	25.6%
Spain	256,393.4	277,125.7	

* Provisional data for the province of Barcelona
Source: DatainveX, Ministry of Industry, Commerce and Tourism

Evolution of exports from the province of Barcelona, 1997 - 2017 (in millions of euros)



* Provisional data
Source: Ministry of Industry, Commerce and Tourism

Industry accounts for 21,4% of total GVA* in Catalonia



- In 2017, industry sector generated 21.4% of the *Gross Added Value in Catalonia, (European Union 19.6% and Spain 18.1%), being the region with the highest industrial development in Spain.
- In 2017, Catalonia was ranked as the 4th European region for jobs in manufacturing that involve medium-high to high technology intensity.
- 230,000 people worked in these activities, only after the areas of Stuttgart, Lombardy and Upper Baviera

MANUFACTURING AND 4.0 INDUSTRY



PRODUCTION SPECIALISATION

Productive structure. Employees by economic sector, 2017 (%)

	BARCELONA	BMR	CATALONIA	SPAIN
Agriculture	0.0	0.1	0.3	0.4
Industry	7.4	14.0	16.3	14.1
Construction	2.7	4.1	4.7	5.3
Services	89.9	81.8	78.7	80.0
TOTAL	100.0	100.0	100.0	100.0

Source: Department of Statistics of Barcelona City Council and Idescat

People employed in high-tech industries in European Regions, 2017

REGION (CITY)	% PEOPLE EMPLOYED OF TOTAL	EMPLOYED WOMEN (THOUSANDS)	TOTAL PEOPLE EMPLOYED (THOUSANDS)
Stuttgart (Stuttgart)	19.8	96	435
Lombardy (Milan)	9.4	109	411
Upper Baviera (Munich)	12.4	76	316
Catalonia (Barcelona)	7.0	74	230
Karlsruhe (Karlsruhe)	14.4	46	207
Istanbul (Istanbul)	3.7	43	207
Piemont (Turin)	10.5	46	190
Emilia-Romagna (Bologna)	9.3	41	183
Dusseldorf (Dusseldorf)	7.2	42	180
Rhône-Alpes (Lyon)	6.1	53	174
Darmstadt (Frankfurt)	8.1	41	164
Île-de-France (Paris)	3.0	45	160
Cologne (Cologne)	7.1	35	156

Source: Eurostat

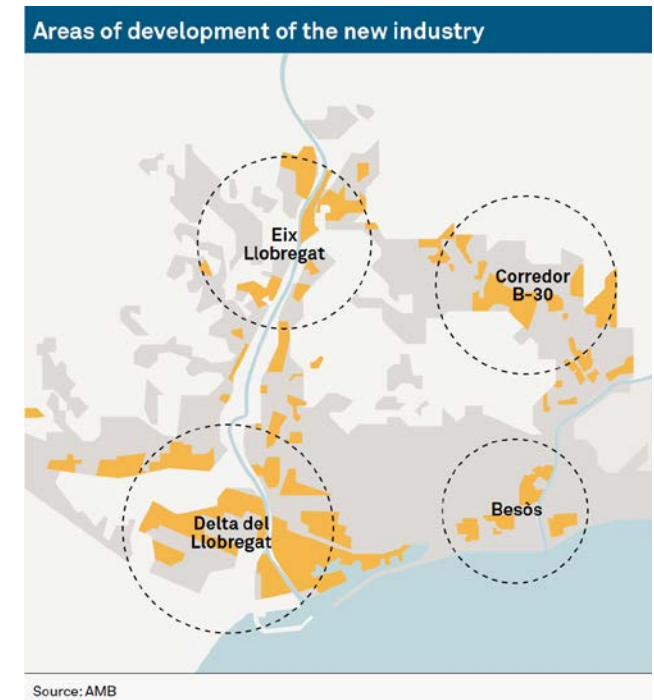
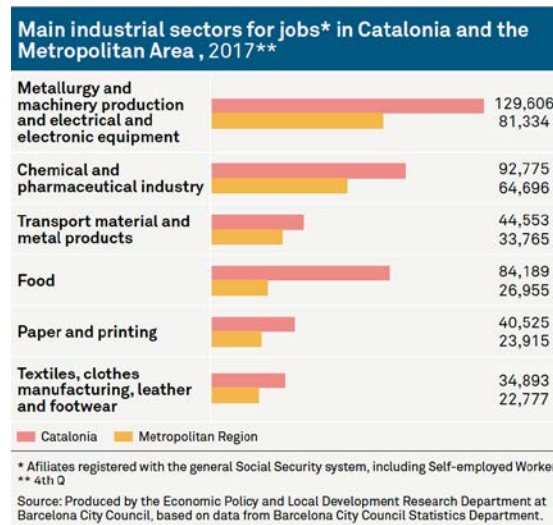
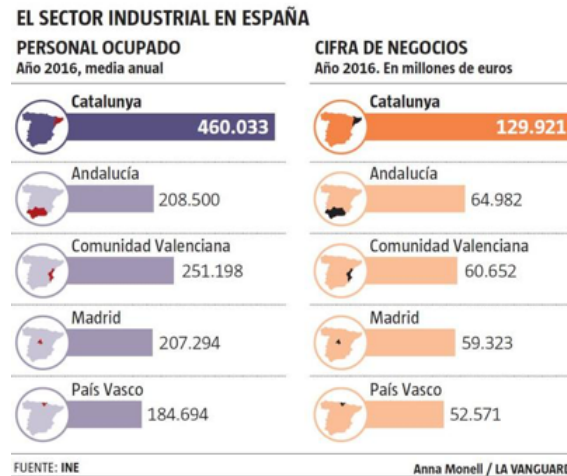
Catalonia represents 23% of the total industrial activity in Spain



- Within Spain, Catalonia concentrates a 22.8% of the industrial activity and 22.2% of the employment, being the region with the highest industrial weight
- Barcelona has an important industrial sector and the metropolitan area - with 14% of the working population employed in industry- is home for more than half (60%) of this employment in Catalonia

Key areas include:

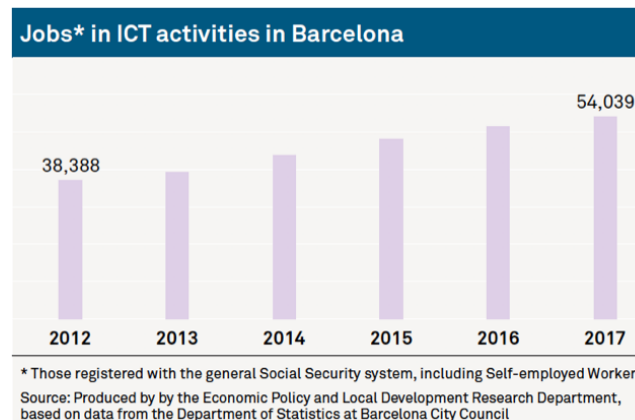
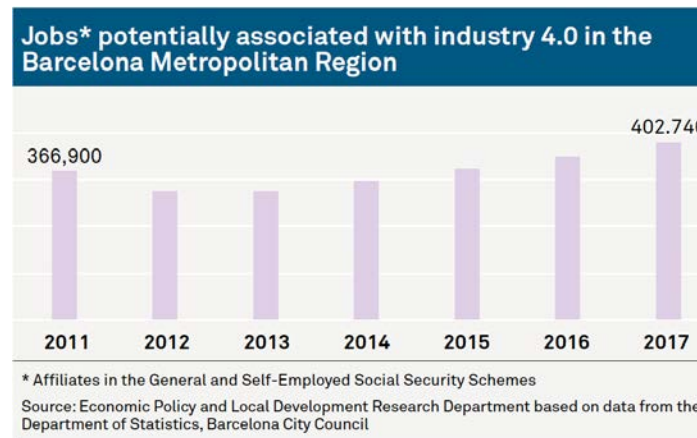
- The Chemical and pharmaceuticals cluster
- The automobile cluster
- Food production
- Paper and graphic art



Growing focus towards industry 4.0 and digital technologies



- Barcelona and its metropolitan area are working to develop industry 4.0 using Big Data and 3D printing
- The city is also promoting digital manufacturing for schools, companies entrepreneurs and community projects
- In 2017, Barcelona Metropolitan area gathered 400,000 jobs in activities associated with industry 4.0
- The city is strongly committed to the digital technology and ICT*, with 54.000 jobs and over 2700 companies



ICT SECTOR / INFORMATION AND COMMUNICATION

Connected and cohesive cities for sustainable development, 2016

CITY	WORLD RANKING 2014	WORLD RANKING 2016	
Stockholm	1	1	=
London	2	2	=
Singapore	4	3	▲
Paris	3	4	▼
Copenhagen	5	5	=
Helsinki	6	6	=
New York	7	7	=
Oslo	8	8	=
Tokyo	10	9	▲
Seoul	12	10	▲
Taipei	13	11	▲
Los Angeles	11	12	▼
Barcelona	18	13	▲
Hong Kong	9	14	▼
Berlin	16	15	▲
Munich	14	16	▼
Miami	15	17	▼
Warsaw	20	18	▲
Rome	21	19	▲
Sydney	19	20	▼
Moscow	17	21	▼
Istanbul	27	22	▲
Abu Dhabi	23	23	=
Athens	24	24	=
São Paulo	25	25	=

Source: Networked Society City Index 2016, Ericsson AB

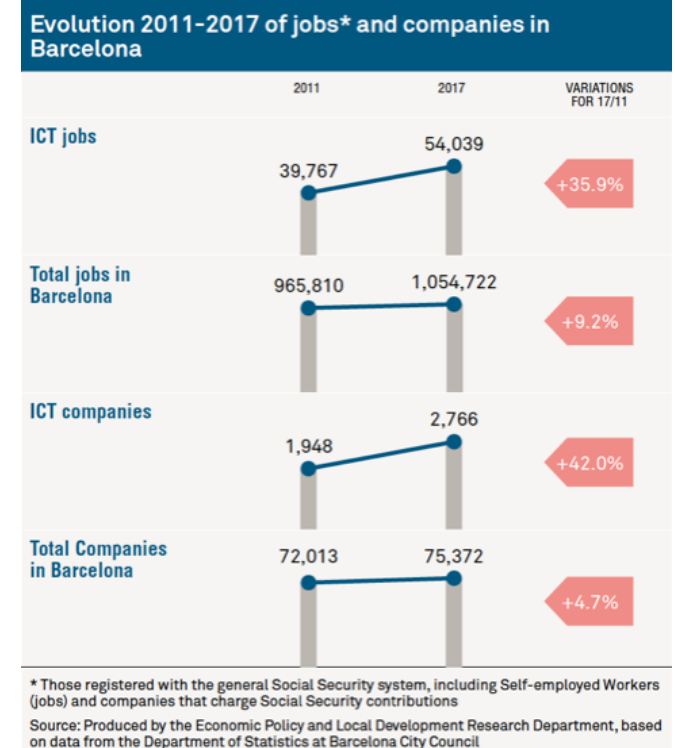
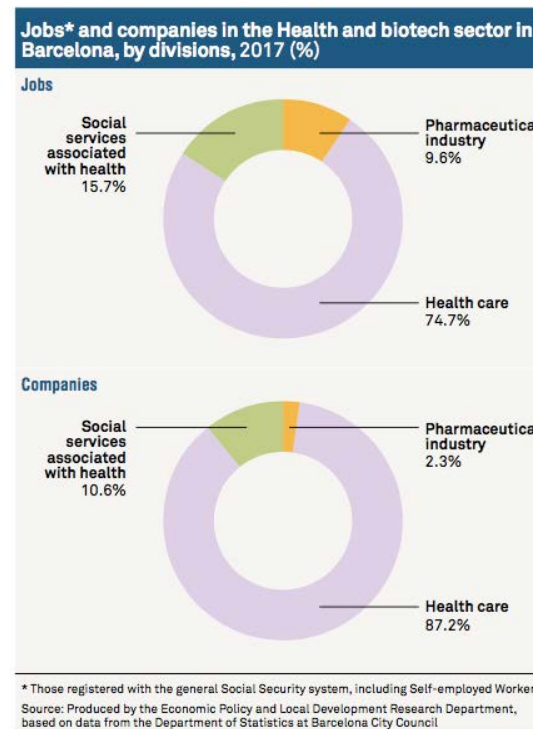
* Information and Communication Technologies

Industry model evolving towards a more efficient and sustainable model



- The city is working towards an economic model based on efficiency and the promotion of the green and circular economy
- The health and bio sector in Barcelona are additionally very relevant, employing 8,5% and 4,1% of the jobs in Barcelona respectively
- Catalonia holds 27% of the biotech companies in Spain, leads in investment in biotechnology R&D and has 15 university hospitals, 9 research institutes and 6,000 researchers in this field

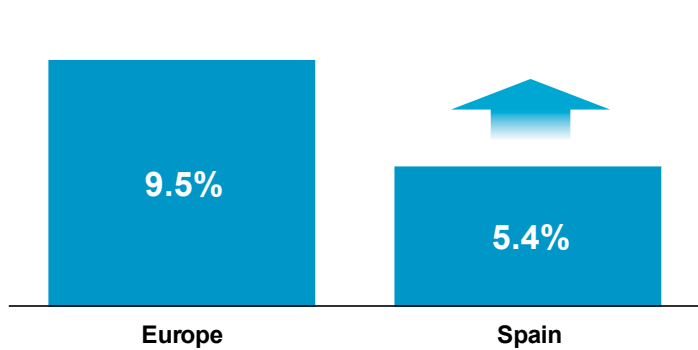
HEALTH AND BIOTECH



Logistic sector: e-commerce expansion and Barcelona's strategic geographical position are driving the growth in the sector



E-commerce sales as a percentage of total retail sales should move closer to the European rate. 2018



600 USD
is the medium income by user in Spain in e-commerce. In 5 years it should reach +43%

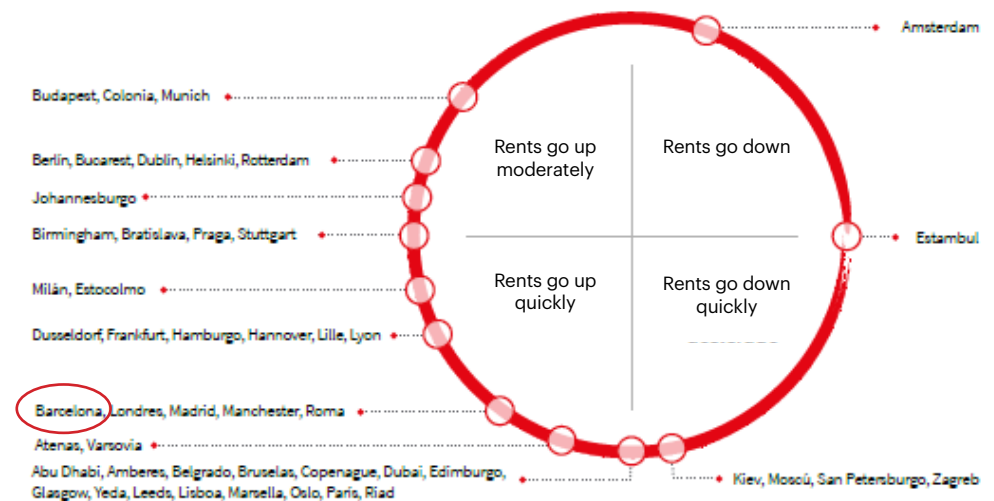
7€/m2/month
Prime rent (Centre zone), cheaper than other European cities.

5.25%
Yield logistic sector

Strategic geographical position of Barcelona for present and future connections with Europe



Clock of European rents growth in logistic sector



Why Barcelona



Strategic location and market potential

- Strategic location: the capital of the Mediterranean sea.
- Market potential: Barcelona metropolitan area with circa 5M people, is the gate way to Southern Europe.
- Good international connections by sea, air and roads.
- Solid Infrastructure
- Unique quality of life.

Competitiveness in costs

- Average salary level is in the lower to mid range among the most developed cities.
- Office and industrial rental prices are competitive, compared to other European cities.
- Housing is still cheaper than main European capitals.

Well positioned to generate and attract talent

- High quality education system with internationally ranked business schools: IESE and ESADE.
- The city is a talent magnet for internationals. 18.5% of the population are foreigners. The international talent attracted by the high quality standards and the interesting job offers, reinforced by the growing digital and tech ecosystem.

Tech, Digital and Knowledge Focus

- Diversified economy and traditionally very entrepreneurial.
- Growing startup hub: with 1,100 tech startups as the 5th European startup hub. In tech entrepreneurship, Barcelona is the 3rd most attractive city to set up a startup, after Berlin and London.



Sources:

- Observatori Barcelona 2018 Report
- Barcelona Data Sheet 2018
- Cushman & Wakefield Data
- GDP Data Source: Oxford Economics
- Global Cities Investment Monitor 2018, KPMG
- Networked Society City Index 2016, Ericsson AB
- International Congress and Convention Association (ICCA)
- 2thinknow Innovation Cities™ Index 2018
- The State of European Tech 2017
- Financial Times, Global MBA Ranking 2018
- Global Entrepreneurship Monitor (GEM), Executive brief for Catalonia 2017-18
- The Safe Cities Index 2017. The Economist Intelligence Unit
- FDi Cities and Regions of the Future 2018/19
- Ajuntament de Barcelona DataSheet 2018
- Observatori de Barcelona 2018

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