

# **Logistics in Spain**

## Understanding a Developing Market

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**TNT Logistics España**

TNT Logistics España was established in 1996 and is part of the larger TNT Logistics which, in turn, is an operating division of Dutch express, mail and logistics group TPG N.V. TNT Logistics is a leading global logistics company, operating in 36 countries. TNT Logistics generated sales of EUR3.4 billion in 2002. Based in The Netherlands, TPG has a turnover of EUR11.7 billion and provides express, logistics and mail services. The Group employs more than 150,000 people in 62 countries.

In Spain, TPG's revenues amounted to EUR228.0 million in 2001, of which TNT Logistics España accounted for EUR75.0 million. TNT International Express España and Mailfast generated revenue of EUR103.0 million and Panair generated EUR50.0 million. In 2002, TNT Logistics España generated a turnover of EUR60.0 million, a decrease from the 2001 turnover figure. The decline in turnover was due to the termination of the SEAT contract. The company operates 40 logistics contracts in Spain from 14 warehouses.

**Table 16: TNT Logistics España operational statistics, 2002**

Location	Warehouses	Warehouse space m <sup>2</sup>	Employees
Bilbao	4	21,000	62
Palencia	1	16,850	90
Madrid	3	150,000	216
Valladolid	1	18,000	100
Barcelona	4	77,500	215
Islas	1	19,056	-
<b>Total</b>	<b>14</b>	<b>302,406</b>	<b>683</b>

Source: TNT Logistics España

**Table17: TNT Logistics España warehousing statistics, 2002**

Location	Region / Client	Space m <sup>2</sup>
Seseña	Centre- South	85,000
Alcalá De Henares	Centre-South	32,000
Sant Sadurní D'anoia	Catalonia	48,500
Zalla	Basque Country-North	5,000
Islas Canarias	Islas Canarias	19,056
Valladolid	Dedicated (Renault)	18,000
Palencia	Dedicated (Renault)	16,850
Alcalá De Henares	Dedicated (Fiat)	33,000
Vilanova Del Valles	Dedicated (Digec)	5,000
Idiazabal	Dedicated (Herr. Bellota)	5,000
Basauri	Dedicated (Fagor)	9,000
Miranda De Ebro	Dedicated (Toyota)	2,000
Manresa	Dedicated (Pirelli)	12,000
Parets Del Vallés	Dedicated (Valeo Clim.)	12,000

*Source: TNT Logistics España*

**Table 18: TNT Logistics España clients by sector, 2002**

Industry sector	Client
Automotive	Fiat / Piaggio, Delphi Diesel Systems, Magneti Marelli, Borgers, Aprilia, Toyota, Valeo, Melchioni, Fico Mirrors
Tires	Good Year – Dunlop, Pirelli
Electronics / Telecoms	Fagor (Sat), Sogecable, Compaq, Kenwood, Grundig, Alcatel, Nokia, Siemens, Motorola, MGE UPS System (Merlin Gerin), ABB Electrocomponentes, Hewlett Packard
Tools	Black & Decker, Herramientas Bellota
Publishers	Enciclopedia Catalana (Digec)
Fashion Garments	Coflusa (Camper & Dr. Martens)
Health Care	Smith & Nephew, Novartis (Marketing and samples), Chefaro, B-Braun
Consumer Goods	Gillette, Oral-B, Duracell, Braun, Sanford: Rotring Waterman, Parker, Paper Mate
Stationery Items For Offices	Bruneau

*Source: TNT Logistics España*

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