

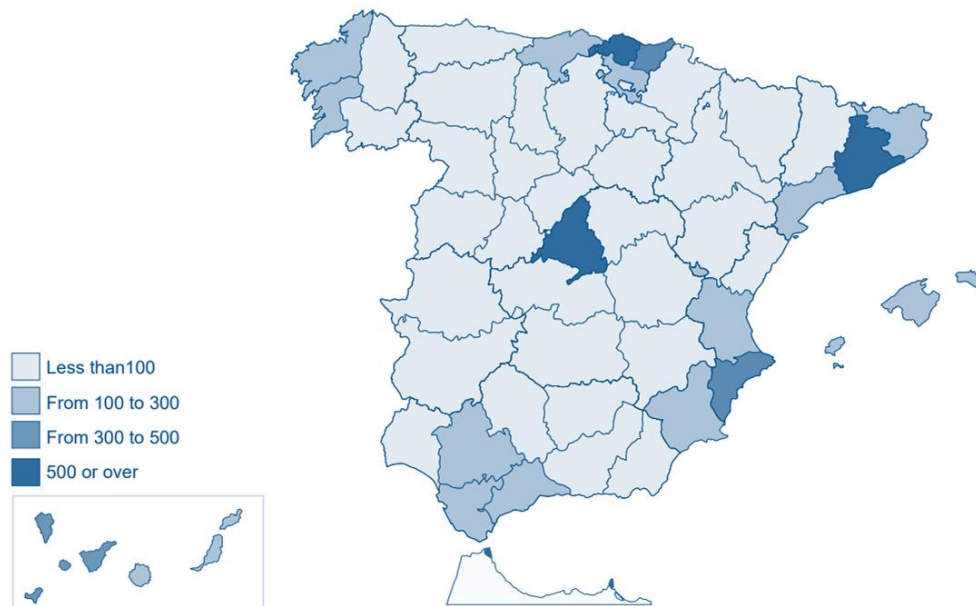
Country Deep-Dive: Spain

ARVATO SUPPLY CHAIN SOLUTIONS AT A GLANCE



Spain Market Overview

A constantly developing market



High population density in dark blue colored areas

Source: Population Figures (National Geographic Institute of Spain, 2021)

Population

47.3 M

GDP

€1,20 T

Av. Labour

€14.69 p.h.

Av. Salary

€26,832 p.y.

Population Split

- 0-14 y.o.: 14%
- 15-65 y.o.: 66%
- +65 y.o.: 20%

- Female: 51%
- Male: 49%

Distribution

- Metropolitan: 39.8 M
- Rural: 7.5 M

E-Commerce Sales

- Fashion 29%
- Electronics 23%
- Food & Beverage 15%
- Personal care 12%
- Toys, arts & crafts 8%
- Home 4%
- Others 9%

E-Commerce Revenue

- 18 B in 2020
- 19.4% of total retail sales
- Yearly spend per person: €2.336

Transport Cargo Split

- Truck: 94.4%
- Water: 3.6%
- Rail: 2.0%
- Air: 0.1%

International Trade Split

1	France	16%
2	Germany	11%
3	Italy	7%
4	Portugal	7%
5	UK	6%
6	USA	4%
7	The Netherlands	3%
8	China	3%
9	Belgium	2%
10	Morocco	2%

E-Commerce Growth

- 2021 vs 2020: +21%
- 2020 vs 2019: +36%

Arvato in Spain

At your side for the best omnichannel experience



SITES
3 existing



SHIPMENTS
11+ M annually



WAREHOUSE
>58,000 sqm



EMPLOYEES
1200+

Locations*

- Alcalá de Henares
- Parla

*Possibility of fast expansion without limitation according to client's demand

Industries

- Tech
- Healthcare
- Fashion, Beauty & Lifestyle
- Automotive, Banks & Insurances

Channels

E-COMMERCE

RETAIL

OMNICHANNEL

In Spain since

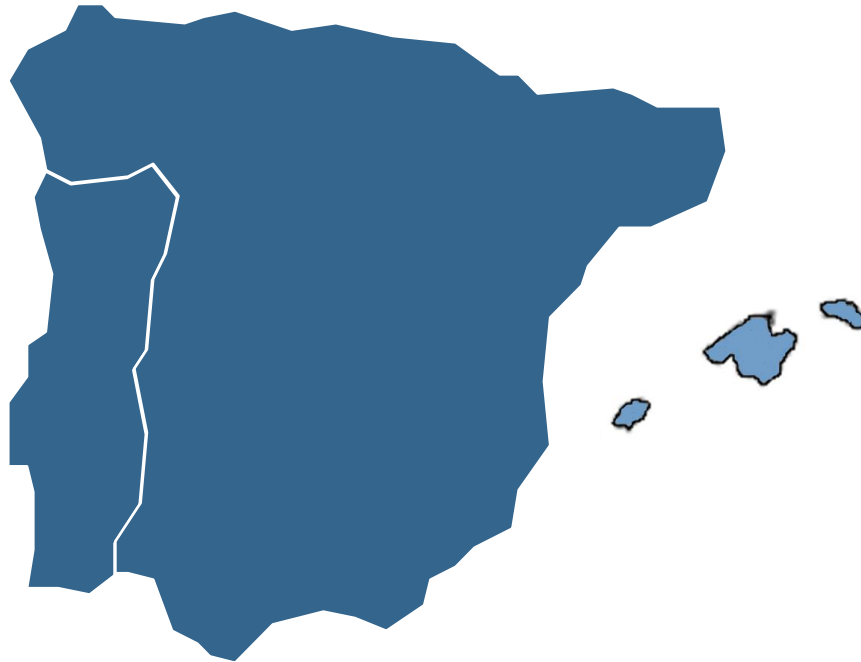
- 1990

Main services

- Digital services
- OMS
- Customer service
- Fulfillment
- Transport management
- Returns management
- Automation
- VAS
- And more:
 - Carbon neutral 2030
 - Quality certifications
 - Security – TAPA
 - Temperature control

Delivery Times in Spain

Lead-times based on proximity



Delivery solutions

- Same day delivery in wide Spanish and Portuguese territories
- Different types of transport according to customers' need: same day delivery, next day delivery, delivery on Saturdays
- 24h delivery to adjoining South of France

Lead-times (color coding)

● 24h ● 24-48h ● 48-72h

Our Solution. Your Growth.

Summary



Demanding, fast-growing market

- Growing +20% annually
- Iberian territory extension require local presence to be close to consumers
- Ability to achieve short time to market 24-48h
- Competitive local average labor costs
- Management of Iberian mainland (Spain & Portugal) from one single point



Local presence, acting global

- Large network of supply chain experts
- 1 global IT backbone with fully integrated WMS, TMS, OMS and IT Systems
- Strategic location to reach out 70 million potential customers within 24h-48h
- Strategic site locations allow same day delivery for more than 5 million end-consumers
- Trade & customs management for Spanish islands



Let's get in touch!



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