SPECIAL EDITION
Transporte XXI
December, 2025

COOL LOGISTICS

2025 EDITION

logistics made in Spain

Transporte XXI

Published by

INDUSTRIA Y COMUNICACIÓN SA

José María Olabarri 6, 2 office 9
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

GRUPO XXI DE COMUNICACIÓN
EMPRESARIAL

Printed by

GRAFILUR SA

Contents

Sponsors

Port de Barcelona

Puerto de Algeciras

valenciaport
Autoridad Portuaria de Valencia

PrimaFrio

JCARRION

ALTIUS

APM TERMINALS

Bilbao PORT

Port of Cartagena
Cartagena Port Authority

Port of Cadiz Bay
Cadiz Bay Port Authority

Port of Málaga
Málaga Port Authority

Port Tarragona

Port of Vigo
Port Authority of Vigo

DHL

logista

GLOBAL LOGISTIC
Algeciras Port

ANDAMUR
every trip matters

GRIMALDI LINES

PETROMIRALLES

HUTCHISON PORTS
BEST

CRUZ

UTA | Edenred

VIIA

FRUIT AND VEGETABLE SECTOR | **GLOBAL PRODUCTION**

AT THE HELM OF EUROPE

SPAIN, POISED TO RE-ENTER THE GLOBAL TOP 10, REMAINS THE EU'S LEADING FRUIT AND VEGETABLE PRODUCER

The agri-food industry continues its upward trajectory, but growth is slowing when compared with previous years, weighed down by geopolitical tensions and climate change (see attached table). Global fruit and vegetable production surpassed 2.3 billion tonnes in 2023, the latest year for which official data is available. This figure represents a 1 per cent increase on the previous year — marked by the outbreak of the Ukraine war— and stands 6 per cent above pre-pandemic levels. The data, released by the United Nations Food and Agriculture Organization (FAO) and processed by Transporte XXI, shows the sector's continued resilience.

Spain's fruit and vegetable industry found itself at a crossroads in 2023, a critical year shaped by severe drought following two consecutive years of insufficient rainfall. Although production volumes slipped slightly (-0.3 per cent), overall value increased, driven by higher prices and an ability to withstand the pressures of climate change. Despite output remaining 10 per cent below 2019 levels, Spain now stands on the verge of re-entering the global top 10 after being overtaken by Vietnam. Even so, it retains its commanding position within Europe, where it leads fruit and vegetable production.

China, the 'World's Orchard'

On the global stage, China, the 'world's orchard' remains firmly at the top of the rankings. The Asian giant exceeded 936 million tonnes of fruit and vegetable output, growing by 1 per cent year-on-year.

CHINA AND INDIA PULL THE STRINGS

The two Asian countries account for more than half of global fruit and vegetable production, with China leading the way, light years ahead of its closest rivals.

RK	COUNTRY	2023	%23/22	%23/19	2022	2021	2020
1	China	936,054	+1%	+7%	924,675	905,470	888,325
2	India	273,600	+1%	+9%	270,931	258,467	254,895
3	Brazil	72,792	+3%	+4%	70,401	68,701	69,068
4	Türkiye	62,563	+10%	+18%	57,010	57,238	54,604
5	U.S.A.	57,692	+3%	-8%	56,272	58,645	60,254
6	Mexico	52,097	+7%	+10%	48,812	47,079	47,683
7	Indonesia	41,739	+1%	+17%	41,175	39,082	38,326
8	Egypt	38,769	+1%	+11%	38,366	34,978	36,033
9	Nigeria	36,897	-1%	+16%	37,267	36,408	34,478
10	Vietnam	33,871	+3%	+17%	32,816	31,666	30,186
11	Spain	33,844	-0%	-10%	33,935	39,279	38,836
12	Iran	30,022	+1%	-7%	29,683	31,575	31,717
13	Italy	29,648	-6%	-3%	31,561	31,473	31,617
14	Philippines	23,699	+0%	+0%	23,589	23,617	23,511
15	Russia	20,420	+2%	+2%	20,002	19,632	19,858
16	Algeria	17,954	+8%	+13%	16,674	16,004	16,607
17	Uzbekistan	17,591	+0%	+10%	17,589	16,311	15,973
18	Pakistan	17,109	-1%	+6%	17,335	18,311	16,571
19	Colombia	15,733	+1%	+6%	15,508	14,910	14,444
20	France	15,168	+2%	+11%	14,804	14,263	15,044
	TOP 20 TOTAL	**1,827,262**	**+2%**	**+7%**	**1,798,605**	**1,764,148**	**1,738,030**
	WORLD TOTAL	**2,307,977**	**+1%**	**+6%**	**2,280,416**	**2,247,135**	**2,208,142**

Thousands of tonnes. Source: FAO.

This figure alone accounts for more than forty per cent of global production. India follows with 273.6 million tonnes, also up 1 per cent from 2022. Together, the two countries account for over half of the world's total output (52 per cent). Brazil, with nearly 72.8 million tonnes, an increase of a 3 per cent, completes the podium.

FRUIT AND VEGETABLE SECTOR | INTERNATIONAL TRADE

UPWARD TREND REVERSES

GLOBAL FRUIT AND VEGETABLE TRADE FALLS 1% IN A "DIFFICULT" 2023

International trade in fruit and vegetables —a sector uniquely sensitive to logistical, climatic and economic disruption— broke its long-running growth trend in 2023. Despite a slight increase in global production (+1 per cent), global trade volumes fell by 1 per cent, totalling 535 million tonnes. Even so, this figure remains 6 per cent above pre-pandemic levels, according to the latest FAO (Food and Agriculture Organization of the United Nations) statistics.

The year 2023 was "difficult", experts consulted by this newspaper warn. They attribute the decline in trade flows to extreme weather events (heatwaves, drought and flooding), new phytosanitary and tariff barriers, inflation and a drop in consumption caused by rising prices.

TRADE REMAINS ABOVE PRE-COVID LEVELS

The report also highlights the prominence of Spanish agriculture on the global stage. Spain, despite a 1 per cent fall in its fruit and vegetable trade flows, remains fourth in the world rankings, behind only the United States, China and the Netherlands.

Spanish imports and exports surpassed 21.8 million tonnes in 2023 —a volume that distances Spain from the fight for podium positions. Third place continues to be held by the Netherlands, Europe's leading exporter, thanks to the pivotal role of its ports as distribution hubs. Spanish exports reached close to 15 million tonnes (-7 per cent), representing 69 per cent of Spain's total fruit and vegetable trade. This keeps Spain as the world's third-largest exporter —a ranking it topped in 2019. Today, the table is led by China (see attached tables).

It is worth recalling, however, the discrepancy between FAO figures and data from other sources, largely due to differences in product selection. Hence the small variations between the charts and tables accompanying this editorial product. In fact, according to the Ministry of Industry, Trade and Tourism, Spain's fruit and vegetable exports totalled 12.6 million tonnes in 2023 —almost 2.5 million tonnes fewer than the FAO dataset.

The global ranking, combining imports and exports, is led by the United States, with 48 million tonnes.

SPAIN IN THE GLOBAL TOP FIVE

Spain remains a major player in international fruit and vegetable trade, holding its fourth-place global ranking despite a 1% drop in flows in 2023. The decline compared with 2019 rises to 5%.

RK	COUNTRY	2023	%23/22	%23/19	2022	2021	2020
1	U.S.A.	48,183	+0%	+8%	48,104	47,036	44,906
2	China	42,980	+2%	+24%	42,287	39,230	37,222
3	Netherlands	30,986	-2%	+3%	31,590	31,189	29,613
4	Spain	21,853	-1%	-5%	21,987	22,755	22,572
5	Germany	20,606	+0%	-2%	20,508	21,397	21,575
6	Belgium	19,648	-0%	+3%	19,691	19,416	19,630
7	Thailand	18,470	-11%	+38%	20,788	18,587	15,062
8	France	16,991	-1%	+3%	17,128	16,286	16,062
9	Canada	16,083	+5%	-2%	15,384	15,910	17,665
10	Mexico	15,942	+0%	+6%	15,938	15,970	14,841
11	India	14,318	+19%	+42%	12,010	10,688	9,739
12	Italy	13,426	+1%	+3%	13,264	13,011	12,968
13	Russia	11,530	+11%	+1%	10,397	11,319	10,813
14	Vietnam	10,668	+4%	+17%	10,232	10,782	8,787
15	United Kingdom	10,630	-6%	-9%	11,268	10,506	12,171
16	Türkiye	10,619	-0%	+19%	10,671	10,426	9,282
17	Poland	8,191	-3%	+1%	8,418	8,335	7,684
18	U.A.E.	7,006	-9%	+17%	7,716	6,703	6,254
19	Egypt	7,000	-7%	+5%	7,543	6,172	5,938
20	Brazil	5,985	+2%	+8%	5,857	5,731	5,5144
	TOP 20 TOTAL	**351,115**	**-1%**	**+7%**	**352,894**	**344,366**	**332,232**
	WORLD TOTAL	**535,363**	**-1%**	**+6%**	**541,557**	**534,001**	**515,955**

Thousands of tonnes, Source: FAO.

'BRONZE MEDAL' FOR EXPORT SALES

Spain, the world's number-one exporter in 2019, ranks third in 2023 and remains Europe's second-largest exporter. The United States continues to be the biggest buyer of fruit and vegetable products.

TOP EXPORTERS

RK	COUNTRY	2023	%23/22	%23/19	2022	2021	2020
1	China	18,981	+12%	+10%	16,918	16,475	17,715
2	Netherlands	17,727	-2%	+2%	18,155	17,697	16,892
3	Spain	15,026	-7%	-15%	16,120	17,224	17,241
4	Mexico	13,795	-2%	+5%	14,023	13,994	13,163
5	U.S.A.	12,769	+4%	-4%	12,317	13,220	13,291
	WORLD TOTAL	**266,626**	**-2%**	**+4%**	**271,384**	**271,126**	**262,935**

TOP IMPORTERS

RK	COUNTRY	2023	%23/22	%23/19	2022	2021	2020
1	U.S.A.	35,414	-1%	+13%	35,786	33,816	31,615
2	China	23,999	-5%	+38%	25,369	22,756	19,507
3	Germany	14,586	+0%	-5%	14,529	15,357	15,631
4	Netherlands	13,259	-1%	+3%	13,435	13,493	12,721
5	France	10,190	-1%	-2%	10,323	10,253	10,002
	WORLD TOTAL	**268,737**	**-1%**	**+8%**	**270,173**	**262,874**	**253,020**

Thousands of tonnes. Source: FAO.

FRUIT AND VEGETABLE SECTOR | SPANISH FOREIGN TRADE

FROM ANDALUSIA TO EUROPE

FRUIT AND VEGETABLE TRADE GREW 2% IN VOLUME IN THE FIRST FOUR MONTHS OF THE YEAR, REACHING 7 MILLION TONNES

Spain, the world's third-largest exporter—behind only China and the Netherlands—has maintained its prominent role in fresh produce logistics during the opening months of the year.

Spain's foreign trade in fruit and vegetables rose by 2 per cent in volume during the first four months of 2025, reaching 7 million tonnes, and by 12 per cent in value, totalling 11.358 billion. The European Union is by far the main market, accounting for 73 per cent of all trade flows. The figures come from data provided by the Ministry of Industry, Trade and Tourism.

The export sector, which represents 71 per cent of total trade, continued to gain momentum up to April this year. Fruit and vegetable exports totalled more than 5 million tonnes in the first four months, with a value exceeding 8.5 billion. Compared with the same period last year, exports rose by 2 per cent in volume and 11 per cent in value. The upswing is due primarily to strong fruit performance, with fruit exports increasing by 5 per cent in volume and 12 per cent in value. Vegetables, still the main component of Spain's agri-food balance, remained largely stable in volume at 2.8 million tonnes, while value rose by 9 per cent to 4.5 billion.

€ 11.358

BILLION, THE VALUE OF SPAIN'S IMPORT-EXPORT FLOWS UP TO APRIL

While exports remain the sector's main driving force, imports also stood out in the first four months of the year. Between January and April, Spain imported 2 million tonnes of fruit and vegetables—2 per cent more than in 2024—for a total estimated value of over 2.7 billion (+14 per cent). Fruit led the increase, with year-on-year growth of 3 per cent in volume and 21 per cent in value. Vegetables posted more moderate increases of 1 per cent in volume and 2 per cent in value.

One of the suppliers that has increased its presence most notably in Spain's import flows is Morocco. In the first four months of the year, imports from the southern neighbour rose by 6 per cent in volume and 27 per cent in value. This trend has raised concerns among some farming organisations, which are calling for "greater control over entry conditions and real reciprocity in the sanitary and labour requirements applied to EU products".

At origin, Andalusia, Valencia and Murcia—the key agricultural production regions—remain Spain's top exporting autonomous communities. Andalusia accounts for 32 per cent of national exports, reaching 3.9 million tonnes in 2024, up 6 per cent on 2023. It

Europe is the main destination for Spanish fruit and vegetable products.

MEDITERRANEAN-FLAVOURED FRUIT AND VEGETABLES

Andalusia, Valencia and Murcia account for 79% of Spanish fruit and vegetable exports to Europe, with outbound sales totalling nearly 9.9 million tonnes in 2024.

COMMUNITY	SHARE	2024	%24/23	%24/19	2023	2022	2021	2020
Andalusia	32%	3,998	+6%	-12%	3,787	4,095	4,408	4,486
Valencian Cmty.	28%	3,507	+7%	-15%	3,274	3,504	3,765	3,896
Murcia	19%	2,388	+5%	-9%	2,264	2,297	2,595	2,622
Catalonia	8%	994	+4%	-3%	953	897	1,018	982
Castilla-La Mancha	3%	310	+41%	+45%	220	268	222	182
Aragon	2%	203	+7%	-7%	189	119	156	176
Madrid Cmty.	2%	201	+13%	-23%	178	192	231	255
Castilla and Leon	1%	170	-17%	+16%	204	163	175	158
Extremadura	1%	137	+0%	-16%	137	162	159	136
Galicia	1%	105	+4%	+2%	101	78	98	96
Navarre	1%	63	-3%	+7%	65	69	83	69
Basque Country	0%	15	-71%	+40%	54	85	39	8
Balearic islands	0%	13	+21%	-34%	11	12	16	18
La Rioja	0%	8	-34%	-9%	12	5	8	8
Canary islands	0%	7	-74%	-90%	25	32	35	54
Asturias	0%	1	+99%	+222%	0	0	1	0
Cantabria	0%	0	+70%	+240%	0	0	0	0
Rest	1%	183	+66%	+337%	111	56	44	38
TOTAL	**100%**	**12,304**	**+6%**	**-10%**	**11,587**	**12,035**	**13,053**	**13,184**

Data in thousands of tonnes. 2024 preliminary data. Source: Fepex.


GTO

SPAIN, EUROPE'S REFRIGERATOR

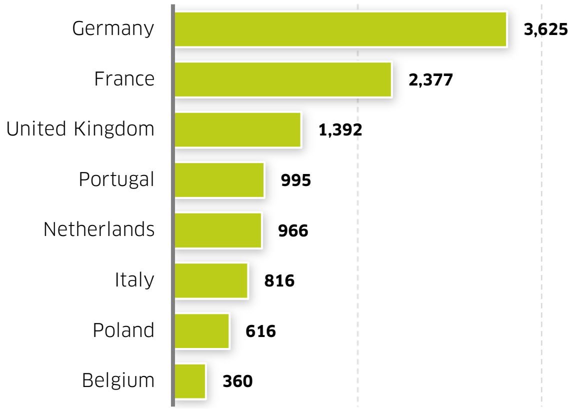
The EU accounts for 73% of Spain's foreign trade in fruit and vegetables, with Germany, France and Portugal as the main trading partners.

TOP 25 TRADING PARTNERS

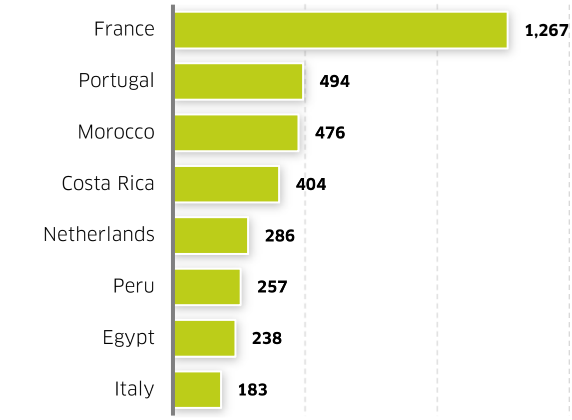
RK	COUNTRY	2024	%24/23	%24/19	2023	2022	2021
1	Germany	3,664	+9%	-3%	3,366	3,363	3,714
2	France	3,644	+9%	+2%	3,356	3,594	3,574
3	Portugal	1,489	+5%	+26%	1,417	1,264	1,246
4	United Kingdom	1,438	+0%	-21%	1,437	1,568	1,679
5	Netherlands	1,252	+1%	-8%	1,238	1,268	1,272
6	Italy	998	+5%	-12%	953	957	1,067
7	Poland	660	+10%	-10%	601	613	704
8	Morocco	586	+5%	+4%	561	680	614
9	Belgium	540	-2%	+0%	551	541	546
10	Costa Rica	408	+7%	+51%	381	333	337
11	Peru	258	+1%	+79%	254	229	212
12	U.S.A.	249	+1%	-9%	246	258	254
13	Czech Republic	247	+9%	+6%	226	233	254
14	Egypt	245	+21%	+807%	203	30	75
15	Sweden	240	+4%	-18%	231	268	298
16	Brazil	228	+6%	-10%	215	192	208
17	Switzerland	201	+7%	+4%	188	177	202
18	Austria	165	+14%	-17%	145	160	182
19	Denmark	162	+0%	-19%	161	176	195
20	Colombia	131	+2%	+10%	128	93	99
21	Ireland	120	+14%	+22%	105	108	109
22	Norway	116	+2%	+7%	115	113	122
23	South Africa	103	-14%	+92%	121	91	90
24	Finland	102	+6%	-11%	97	113	125
25	Hungary	100	+23%	+18%	81	82	96
WORLD TOTAL		**18,950**	**+3%**	**-1%**	**18,397**	**18,024**	**18,812**

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

SPANISH EXPORTS



SPANISH IMPORTS



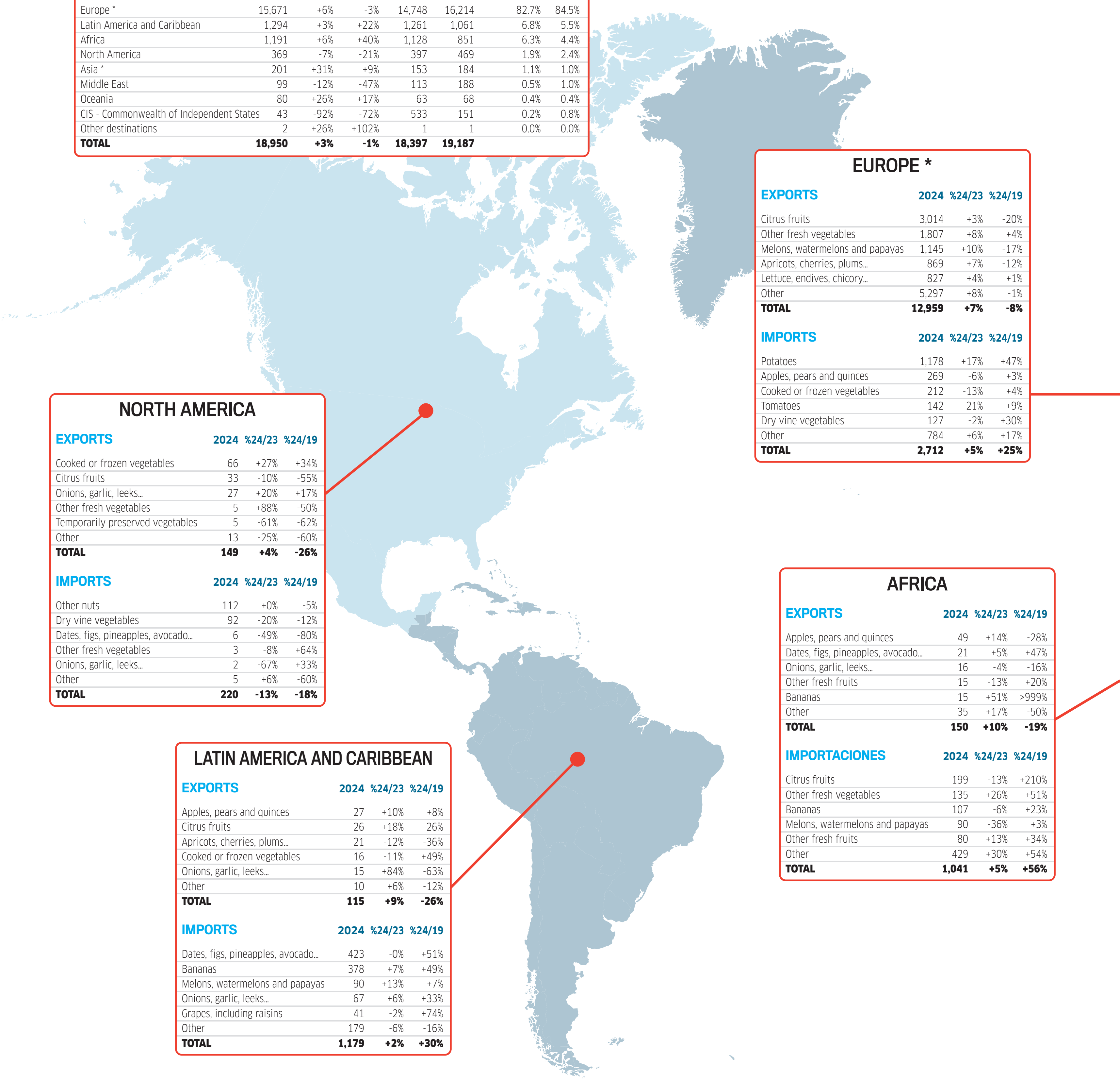
is followed by the Valencia region, with 3.5 million tonnes (+7 per cent), and Murcia, with 2.3 million tonnes (+5 per cent).

As for Spain's main trading partners, Germany and France lead the rankings. The United Kingdom is the top non-EU destination, in fourth position.

FRUIT AND VEGETABLE SECTOR | SPANISH FOREIGN TRADE FLOWS

SPANISH MARITIME TRADE BY REGION

	2024	%24/23	%24/19	2023	2020	CUOTA 2024	2019
Europe *	15,671	+6%	-3%	14,748	16,214	82.7%	84.5%
Latin America and Caribbean	1,294	+3%	+22%	1,261	1,061	6.8%	5.5%
Africa	1,191	+6%	+40%	1,128	851	6.3%	4.4%
North America	369	-7%	-21%	397	469	1.9%	2.4%
Asia *	201	+31%	+9%	153	184	1.1%	1.0%
Middle East	99	-12%	-47%	113	188	0.5%	1.0%
Oceania	80	+26%	+17%	63	68	0.4%	0.4%
CIS - Commonwealth of Independent States	43	-92%	-72%	533	151	0.2%	0.8%
Other destinations	2	+26%	+102%	1	1	0.0%	0.0%
TOTAL	**18,950**	**+3%**	**-1%**	**18,397**	**19,187**		



EUROPE *

EXPORTS	2024	%24/23	%24/19
Citrus fruits	3,014	+3%	-20%
Other fresh vegetables	1,807	+8%	+4%
Melons, watermelons and papayas	1,145	+10%	-17%
Apricots, cherries, plums...	869	+7%	-12%
Lettuce, endives, chicory...	827	+4%	+1%
Other	5,297	+8%	-1%
TOTAL	**12,959**	**+7%**	**-8%**

IMPORTS	2024	%24/23	%24/19
Potatoes	1,178	+17%	+47%
Apples, pears and quinces	269	-6%	+3%
Cooked or frozen vegetables	212	-13%	+4%
Tomatoes	142	-21%	+9%
Dry vine vegetables	127	-2%	+30%
Other	784	+6%	+17%
TOTAL	**2,712**	**+5%**	**+25%**

NORTH AMERICA

EXPORTS	2024	%24/23	%24/19
Cooked or frozen vegetables	66	+27%	+34%
Citrus fruits	33	-10%	-55%
Onions, garlic, leeks...	27	+20%	+17%
Other fresh vegetables	5	+88%	-50%
Temporarily preserved vegetables	5	-61%	-62%
Other	13	-25%	-60%
TOTAL	**149**	**+4%**	**-26%**

IMPORTS	2024	%24/23	%24/19
Other nuts	112	+0%	-5%
Dry vine vegetables	92	-20%	-12%
Dates, figs, pineapples, avocado...	6	-49%	-80%
Other fresh vegetables	3	-8%	+64%
Onions, garlic, leeks...	2	-67%	+33%
Other	5	+6%	-60%
TOTAL	**220**	**-13%**	**-18%**

AFRICA

EXPORTS	2024	%24/23	%24/19
Apples, pears and quinces	49	+14%	-28%
Dates, figs, pineapples, avocado...	21	+5%	+47%
Onions, garlic, leeks...	16	-4%	-16%
Other fresh fruits	15	-13%	+20%
Bananas	15	+51%	>999%
Other	35	+17%	-50%
TOTAL	**150**	**+10%**	**-19%**

IMPORTACIONES	2024	%24/23	%24/19
Citrus fruits	199	-13%	+210%
Other fresh vegetables	135	+26%	+51%
Bananas	107	-6%	+23%
Melons, watermelons and papayas	90	-36%	+3%
Other fresh fruits	80	+13%	+34%
Other	429	+30%	+54%
TOTAL	**1,041**	**+5%**	**+56%**

LATIN AMERICA AND CARIBBEAN

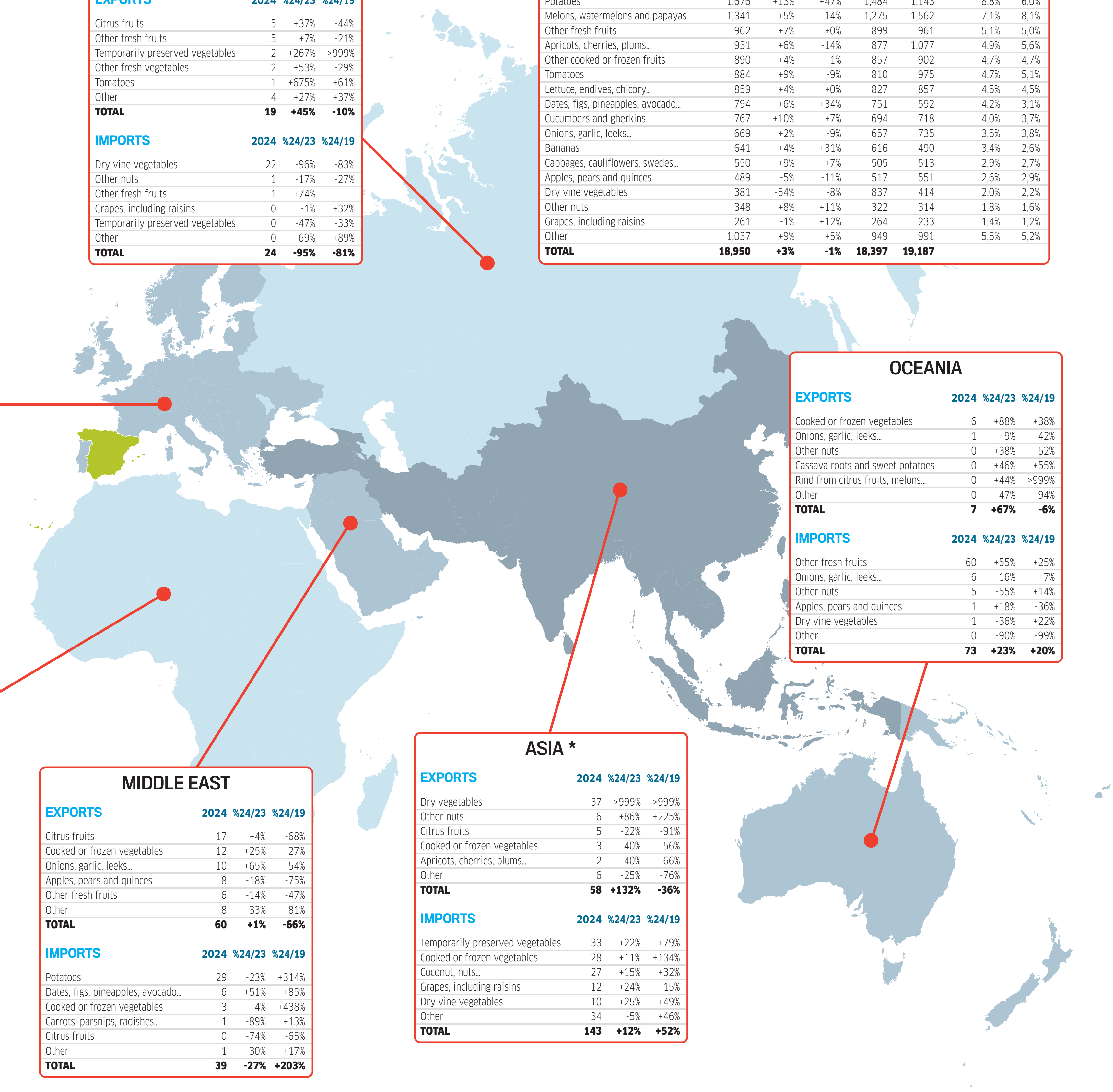
EXPORTS	2024	%24/23	%24/19
Apples, pears and quinces	27	+10%	+8%
Citrus fruits	26	+18%	-26%
Apricots, cherries, plums...	21	-12%	-36%
Cooked or frozen vegetables	16	-11%	+49%
Onions, garlic, leeks...	15	+84%	-63%
Other	10	+6%	-12%
TOTAL	**115**	**+9%**	**-26%**

IMPORTS	2024	%24/23	%24/19
Dates, figs, pineapples, avocado...	423	-0%	+51%
Bananas	378	+7%	+49%
Melons, watermelons and papayas	90	+13%	+7%
Onions, garlic, leeks...	67	+6%	+33%
Grapes, including raisins	41	-2%	+74%
Other	179	-6%	-16%
TOTAL	**1,179**	**+2%**	**+30%**

Spanish exports and imports of fruit and vegetable products, with the origins/destinations indicated, by sea. (*) From Asia and Europe, the countries included in the CIS and the Middle East have been removed.

SPANISH MARITIME TRADE BY PRODUCT

	2024	%24/23	%24/19	2023	2019	CUOTA 2024	2019
Citrus fruits	3,415	+1%	-19%	3,379	4,239	18,0%	22,1%
Other fresh vegetables	2,054	+9%	+7%	1,878	1,919	10,8%	10,0%
Potatoes	1,676	+13%	+47%	1,484	1,143	8,8%	6,0%
Melons, watermelons and papayas	1,341	+5%	-14%	1,275	1,562	7,1%	8,1%
Other fresh fruits	962	+7%	+0%	899	961	5,1%	5,0%
Apricots, cherries, plums...	931	+6%	-14%	877	1,077	4,9%	5,6%
Other cooked or frozen fruits	890	+4%	-1%	857	902	4,7%	4,7%
Tomatoes	884	+9%	-9%	810	975	4,7%	5,1%
Lettuce, endives, chicory...	859	+4%	+0%	827	857	4,5%	4,5%
Dates, figs, pineapples, avocado...	794	+6%	+34%	751	592	4,2%	3,1%
Cucumbers and gherkins	767	+10%	+7%	694	718	4,0%	3,7%
Onions, garlic, leeks...	669	+2%	-9%	657	735	3,5%	3,8%
Bananas	641	+4%	+31%	616	490	3,4%	2,6%
Cabbages, cauliflowers, swedes...	550	+9%	+7%	505	513	2,9%	2,7%
Apples, pears and quinces	489	-5%	-11%	517	551	2,6%	2,9%
Dry vine vegetables	381	-54%	-8%	837	414	2,0%	2,2%
Other nuts	348	+8%	+11%	322	314	1,8%	1,6%
Grapes, including raisins	261	-1%	+12%	264	233	1,4%	1,2%
Other	1,037	+9%	+5%	949	991	5,5%	5,2%
TOTAL	**18,950**	**+3%**	**-1%**	**18,397**	**19,187**		



COMMONWEALTH OF IND. STATES

EXPORTS	2024	%24/23	%24/19
Citrus fruits	5	+37%	-44%
Other fresh fruits	5	+7%	-21%
Temporarily preserved vegetables	2	+267%	>999%
Other fresh vegetables	2	+53%	-29%
Tomatoes	1	+675%	+61%
Other	4	+27%	+37%
TOTAL	**19**	**+45%**	**-10%**

IMPORTS	2024	%24/23	%24/19
Dry vine vegetables	22	-96%	-83%
Other nuts	1	-17%	-27%
Other fresh fruits	1	+74%	-
Grapes, including raisins	0	-1%	+32%
Temporarily preserved vegetables	0	-47%	-33%
Other	0	-69%	+89%
TOTAL	**24**	**-95%**	**-81%**

OCEANIA

EXPORTS	2024	%24/23	%24/19
Cooked or frozen vegetables	6	+88%	+38%
Onions, garlic, leeks...	1	+9%	-42%
Other nuts	0	+38%	-52%
Cassava roots and sweet potatoes	0	+46%	+55%
Rind from citrus fruits, melons...	0	+44%	>999%
Other	0	-47%	-94%
TOTAL	**7**	**+67%**	**-6%**

IMPORTS	2024	%24/23	%24/19
Other fresh fruits	60	+55%	+25%
Onions, garlic, leeks...	6	-16%	+7%
Other nuts	5	-55%	+14%
Apples, pears and quinces	1	+18%	-36%
Dry vine vegetables	1	-36%	+22%
Other	0	-90%	-99%
TOTAL	**73**	**+23%**	**+20%**

ASIA *

EXPORTS	2024	%24/23	%24/19
Dry vegetables	37	>999%	>999%
Other nuts	6	+86%	+225%
Citrus fruits	5	-22%	-91%
Cooked or frozen vegetables	3	-40%	-56%
Apricots, cherries, plums...	2	-40%	-66%
Other	6	-25%	-76%
TOTAL	**58**	**+132%**	**-36%**

IMPORTS	2024	%24/23	%24/19
Temporarily preserved vegetables	33	+22%	+79%
Cooked or frozen vegetables	28	+11%	+134%
Coconut, nuts...	27	+15%	+32%
Grapes, including raisins	12	+24%	-15%
Dry vine vegetables	10	+25%	+49%
Other	34	-5%	+46%
TOTAL	**143**	**+12%**	**+52%**

MIDDLE EAST

EXPORTS	2024	%24/23	%24/19
Citrus fruits	17	+4%	-68%
Cooked or frozen vegetables	12	+25%	-27%
Onions, garlic, leeks...	10	+65%	-54%
Apples, pears and quinces	8	-18%	-75%
Other fresh fruits	6	-14%	-47%
Other	8	-33%	-81%
TOTAL	**60**	**+1%**	**-66%**

IMPORTS	2024	%24/23	%24/19
Potatoes	29	-23%	+314%
Dates, figs, pineapples, avocado...	6	+51%	+85%
Cooked or frozen vegetables	3	-4%	+438%
Carrots, parsnips, radishes...	1	-89%	+13%
Citrus fruits	0	-74%	-65%
Other	1	-30%	+17%
TOTAL	**39**	**-27%**	**+203%**

Tráffic in thousands of tonnes. Source: Agencia Tributaria. Compilation: TRANSPORTE XXI.

Empresa XXI
December, 2025

SURVEY | CHALLENGES OF THE COLD CHAIN LOGISTICS

COLD CHAIN THINKS GREEN

SUPPLY CHAIN PLAYERS INSIST THAT "SUSTAINABILITY IS NON-NEGOTIABLE" AND HIGHLIGHT THE NEED FOR INNOVATION AS THE ROUTE TOWARD "SMART LOGISTICS"

"Sustainability is non-negotiable." This is the shared view of transport companies, logistics operators and shippers consulted by Transporte XXI, who simultaneously stress the need to invest in innovation and digitalisation. They also welcome the increase in truck load capacity and call for cold logistics to be recognised as an electro-intensive sector. "In a context of rising energy costs, this dependency poses a structural risk to profitability and competitiveness," they warn.

WITH THE RISE IN GLOBAL DEMAND FOR FRESH AND FROZEN FOOD, IS COLD-CHAIN LOGISTICS A GROWING SECTOR?

Andrés Valverde / Primafrio

At Primafrio, we witness first-hand the sustained growth in demand for fresh and frozen foods, both domestically and internationally. This increase —driven by factors such as shifting consumption habits, market globalisation and the need to maintain food quality and safety— is positioning cold-chain logistics as a strategic, expanding sector.

The temperature-controlled supply chain has become an essential component. It is no longer simply a matter of volume; it is also about quality and supply assurance. For perishable products requiring cold-chain logistics, orders are increasingly aligned with real sales, forcing the logistics chain to adapt its processes to match the evolving needs of customers who demand fresher products and fewer losses in distribution. It is as if each day trucks were loading the daily shopping basket of end consumers: more multi-product orders, more small orders, more loading locations and, ultimately, far more detailed, precise logistics that require greater resources, adaptability and last-minute responsiveness.

This has led to increased investment in technology, digitalisation and sustainability across the sector. In our case, we are continuously innovating in energy efficiency, automation and traceability, providing reliable, sustainable and competitive solutions.

José Ramón Mazo / Grupo Mazo

The cold-chain logistics sector is growing steadily, driven by changing consumption habits and a world that is increasingly interconnected. Goods are moving faster than ever globally. The need for cold-chain logistics stems directly from the lifestyle adopted by a growing share of the population. Consumers demand quality, food safety and freshness.

María Tena / Aecoc

Absolutely. Cold-chain logistics is in full expansion, driven both by consumption growth and the need to ensure product quality, safety and traceability throughout the supply chain.

In Spain, the frozen food market reached 6 billion in 2024. Fresh products account for 31 per cent of total FMCG spending. That is, each Spanish household spends around 127 on fresh products, according to Circana. Increasingly, consumers alternate between fresh and frozen products.

But growth is not explained by demand alone. In this sector, maintaining product properties intact depends on technical and sanitary coordination throughout the entire chain, from origin to consumption. This requires controlling temperatures from harvesting, catching or manufacturing through storage, transport and retail, all the way to the end consumer.

In this respect, Aecoc Recommendations play a key role: they outline technical specifications that ensure proper handling and preservation of products at every logistical stage. Collaboration among producers, logistics operators, retailers and consumers is essential to guarantee a safe, efficient and compliant product flow.

Marta Sánchez / Narval

It is clear that cold-chain logistics is attracting significant interest from many sectors that previously handled dry goods or other types of cargo and are now moving into cold operations. With increasing refrigeration requirements, operators of other cargo types —such as full loads— are also offering groupage and smaller deliveries, as demanded by the market. This is increasing the range of available options.

Antonio Pérez / ID Logistics

We are clearly in a positive moment for cold-chain logistics, driven by several structural factors. The most relevant is the shift in consumption habits toward fresh, healthy and ready-to-eat products, combined with sustained growth in the online channel, a combination that has created greater demand for reliable, efficient and temperature-controlled logistics solutions. At the same time, the trend also affects other sectors such as cosmetics and pharmaceuticals, where temperature control is critical.

This trend affects the entire refrigerated supply chain, from platform operations to capillary distribution. What was once a specialised service is now a standard market requirement, demanding not only regulatory compliance but also operational flexibility, traceability and energy efficiency.

Alex de Vaan / Grupo Caliche

Without a doubt, it has been a growing sector for years. This was evident in previous crises, such as after the 2008 financial crisis, and more recently during the global pandemic. The food sector is one of the most stable in the market. The global population continues to grow, and people continue buying food of all kinds, even during broader downturns in consumption.

Ángel González / Ontime

It is undoubtedly a growing sector. And although demand for fresh and frozen products is indeed increasing, we believe that one of the key factors is the growing demand for quality from end consumers and, consequently, from retailers. What used to be "positive cold," with limited specifications, has now become highly specific temperature ranges, narrowly defined for each product. Some products fall outside "quality guarantee" parameters if temperature deviates even 2 degrees from the permitted window, something that inevitably affects the logistics chain. This drives greater and better investment.

David Moreno / ESP Solutions

Of course, cold-chain logistics is growing. Food retailers are offering increasingly higher-quality products to customers, and these demands translate into greater requirements and pro-

ANDRÉS VALVERDE
Chief Operating Officer, Primafrio

"IT IS ESSENTIAL TO RECOGNISE THE STRATEGIC NATURE OF THE SECTOR"

JOSÉ RAMÓN MAZO
CEO, Grupo Mazo

"THE SECTOR'S MODERNISATION CANNOT BE BUILT AT THE EXPENSE OF ITS VIABILITY"

fessionalism across the supply chain, from field to shelf. In our case, this applies not only to fresh and frozen foods, but also to the pharma sector. We are fully aware of the importance of maintaining the correct temperature. It is critical to ensuring product efficacy, safety and quality. Vaccines, insulin and biological reagents are extremely sensitive to thermal variations and can lose therapeutic properties if the cold chain is compromised at any point.
This requires specialised logistics systems: refrigerated vehicles and continuous monitoring devices ensuring compliance with health regulations such as Good Distribution Practices. Preserving the cold chain protects not only patient health but also reinforces responsibility and reputation.

Montse Cobos / DHL Supply Chain

Cold-chain logistics is undoubtedly booming. At DHL Supply Chain we have seen constant growth in demand for logistics solutions for fresh fruit and vegetables. This growth is driven by consumer interest in high-quality, sustainable products, which in turn pushes us to continually innovate in our operations to offer more efficient and environmentally respectful logistics.

Carlos García / FVET

Cold-chain logistics continues to grow year after year. Rising demand for perishables is one of the reasons, but not the only one. We must also consider improved competitiveness among our companies: investments in digitalisation, energy efficiency, specialised training, innovation and improved technological infrastructures. We are also working to minimise the impact of product seasonality and to anticipate extreme climate effects that could harm the sector.

Javier Jiménez / Molinero Logística

Yes, of course. Transport and logistics is a growing sector.

Ángel de la Rosa / Alcampo

Cold-chain logistics is clearly on the rise. Growth in consumption of fresh, prepared and frozen products, together with higher consumer awareness around quality and food safety, is driving investment in capacity, technology and efficiency throughout the temperature-controlled supply chain. Moreover, the expansion of the online grocery channel has strengthened the need for reliable and versatile cold logistics solutions capable of serving more fragmented demand with high service standards.

MARÍA TENA

Director of Logistics and Transport, Aecoc

"SUSTAINABILITY IS TRANSFORMING THE LOGISTICS CHAIN"

MARTA SÁNCHEZ

CEO, Narval

"COLD-CHAIN LOGISTICS SHOULD BE CONSIDERED ELECTRO-INTENSIVE"

WHAT IMPACT DOES THE INCREASE IN VEHICLE LOAD CAPACITY HAVE ON COLD-CHAIN LOGISTICS?

Andrés Valverde

The rollout will impact, first of all, safety, affecting both road users and drivers themselves, who will have to haul heavier loads increasing from 40 to 44 tonnes. It will also impact per-vehicle costs, not only through higher fuel consumption per trip but also increased maintenance costs, which will fall on the transport operator. In addition, there will be significant wear and tear on road infrastructure, affecting safety and requiring higher spending on road repairs.

For these reasons, we insist on modifying the existing regulation so that transport operators are not held responsible for weight increases that are currently not recognised.

Regarding long-haul freight transport, we have always insisted on the need to harmonise legislation at European level so that all operators are subject to the same regulations. The effectiveness of this measure is also limited by the current lack of such harmonisation.

José Ramón Mazo

These vehicles represent, in theory, an opportunity to increase transport efficiency by reducing the number of trips. However, it is essential that this progress does not fall solely on the transport operator. At Grupo Mazo, we have both the capacity and the willingness to adapt —as we always have— but we believe this adaptation must also be economically sustainable. The sector cannot modernise at the expense of its own viability.

María Tena

Increasing vehicle capacity represents a major opportunity to improve the efficiency and sustainability of refrigerated transport. Operating with 44-tonne vehicles, duotrailers or megatrucks can reduce the number of journeys, optimise cost per transported tonne and lower the carbon footprint.

However, a major challenge is that refrigerated vehicles already carry significant weight due to refrigeration equipment, insulation and thermal safety systems. This means that with current maximum authorised masses, it is often impossible to take full advantage of additional volume. For this reason, the sector is calling for specific regulation allowing weight-compensation measures or formal recognition of the structural overweight caused by refrigeration equipment.

Increasing capacity is undoubtedly a lever for efficiency and sustainability, but its full potential in cold-chain logistics will only be realised if regulation adapts and thermal and operational integrity of the product is safeguarded throughout transport.

Marta Sánchez

Any measure that increases vehicle capacity and therefore improves loading efficiency is positive, especially under the current resource constraints faced by the sector.

Antonio Pérez

Increasing vehicle load capacity has a very positive impact on the efficiency of refrigerated transport for obvious reasons. These vehicles allow more goods to be moved per trip, reducing the number of journeys and therefore CO_2 emissions and fuel consumption. In a context where sustainability is a priority and margins are increasingly tight, these solutions add both economic and environmental value.

In cold-chain logistics, the use of such vehicles must be accompanied by meticulous planning and infrastructure capable of handling their size. Smart logistics —combining capacity, traceability and constant temperature control— is essential. Their incorporation must be part of a broader strategy aimed at improving productivity without compromising service quality.

It is also important to ensure a clear regulatory framework and collaboration with public administrations to guarantee viability on certain routes and access points.

Alex de Vaan

It brings greater efficiency and cost savings, although its impact in Spain has not yet been very significant. Even so, the number of such vehicles will increase in the near future. In the United Kingdom, for example, high-capacity vehicles have been circulating for many years, particularly for major supermarket chains. However, some locations will still require adaptation to handle large-volume loads, as not all platforms can currently manage duotrailers or megatrucks due to their size.

Ángel González

The productivity impact of EMS (European Modular System) vehicles, both 60- and 72-tonne variants, has been spectacular, as shown by their acceptance and deployment in the sector.

And this is not just our view; since 2005 we have pushed for this initiative, and the real proof is visible on the road, where countless EMS combinations are now circulating. The impact

(Continued on page 14)

SURVEY | **CHALLENGES OF THE COLD CHAIN LOGISTICS**

(From page 13)

of 44-tonne limits will be even greater. We were convinced of this ten years ago, when, under Pere Padrosa as Director-General of Transport of the Generalitat, Ontime carried out extensive field tests demonstrating ease of application and operational safety. We firmly believe this will represent a competitive advantage for Spain at national level, at a time when we urgently need to improve efficiency.

Nonetheless, it is important to remember that these productivity gains come with extra costs for transport operators, and net improvement must be shared between shippers and hauliers. If we improve the system, we should all benefit.

David Moreno

Increasing vehicle capacity has several impacts. More capacity requires fewer vehicles, which, in the current shortage of drivers, is positive. Environmentally, I have doubts about its neutrality: while fewer trucks circulate, fuel consumption per vehicle is higher due to increased weight, whether using trailers, duotrailers or megatrucks. In terms of cost, transport will clearly become more expensive due to higher consumption and required investment, so these costs must be reflected in tariffs.

Montse Cobos

Increased vehicle capacity has a very positive impact on logistics. Depending on product density, the impact may be even greater, allowing better volume optimisation per vehicle and reducing environmental impact. It also allows route optimisation and improves delivery efficiency. At DHL Supply Chain, we use an intelligent transport network connecting Spain, Portugal and Morocco with Europe, helping us maximise vehicle occupancy and reduce emissions, contributing to more sustainable logistics.

Carlos García

Increasing maximum authorised mass from 40 to 44 tonnes for heavy vehicles with five or more axles is one of the major debates in road freight transport today. The weak negotiating position of hauliers could force them to carry more tonnage at similar prices but with higher costs. We need a balanced transition that takes into account operational costs and competitiveness, with investment in innovation and sustainability.

ANTONIO PÉREZ LÓPEZ

Senior Manager Retail, ID Logistics Iberia

“IT IS CRUCIAL TO INVEST IN SMART LOGISTICS”

ALEX DE VAAN

Expansion Manager, Grupo Caliche

“THE SHORTAGE OF SKILLED PROFESSIONALS IS A EUROPE-WIDE PROBLEM”

Javier Jiménez

It is helping alleviate the difficult situation caused by the shortage of drivers.

Ángel de la Rosa

Using higher-capacity vehicles allows optimising loads, reducing journeys and improving the economic and environmental efficiency of cold-chain transport. This is especially relevant for high-turnover products or long-distance routes where transport costs directly impact competitiveness.

We already use such vehicles on certain routes, always ensuring regulatory compliance and maintaining the cold chain.

DOES THE SHORTAGE OF QUALIFIED LABOUR AND THE PURSUIT OF EFFICIENCY DRIVE GREATER AUTOMATION IN TEMPERATURE-CONTROLLED LOGISTICS?

Andrés Valverde

The combination of a shortage of qualified staff and the need for operational efficiency is accelerating automation throughout the logistics chain, including cold-chain logistics, where error margins are minimal. However, despite technological progress, people remain at the centre of our operations, as not all processes can currently be automated. Fruit and vegetables, for example, vary in palletisation (boxes per pallet, height, weight...) and warehouse activity is mostly cross-docking, which is difficult to automate entirely.
Nevertheless, we have incorporated digitalised control processes that allow us to improve service quality, increase efficiency and optimise resources.
Our fleet of more than 6,000 vehicles connected in real time via IoT enables incident anticipation, better route planning and improved energy efficiency. We also invest in continuous training and collaborate with universities and technology centres to ensure knowledge transfer that combines human talent with automation benefits.

José Ramón Mazo

There are many advances in process automation, but in truck driving, which is our main activity, we still see a future without human participation as a distant scenario. Some brands have conducted trials on closed and open circuits, but fully autonomous driving is still far off.

María Tena

Yes, clearly. The scarcity of qualified personnel —especially drivers— combined with the challenge of maintaining efficiency in extreme conditions, is accelerating automation. Leading companies are already implementing robotic systems in refrigerated warehouses, IoT sensors, predictive algorithms and digital twins. These solutions not only improve productivity and safety but also support better energy management and adaptation to demand peaks. Automation in cold-chain logistics does not eliminate jobs; it

A worker operates a forklift in a cold storage warehouse.

transforms them. More qualified and technologically skilled profiles are increasingly needed.

Marta Sánchez

All companies in the sector are immersed in process automation and demand forecasting, one of the most critical aspects of cold logistics because fresh product requires extremely accurate planning. However, the shortage of qualified labour in key logistics roles, such as drivers and warehouse staff, remains one of the greatest challenges, and unfortunately it is severely affecting the sector.

Antonio Pérez

The shortage of qualified labour, espe-

cially in demanding operations such as temperature-controlled logistics, is acting as a catalyst for automation. Working conditions in cold environments —extreme temperatures, the need for speed and precision, and high product turnover— make robotisation and digitalisation increasingly compelling.
Automation improves safety, ergonomics, real-time control and traceability —critical aspects in cold-chain logistics. Technologies such as automated storage systems, AGVs, innovative picking solutions and AI-driven management platforms optimise resources, ensure service consistency, reduce errors and facilitate rapid adaptation to demand spikes.


MECALUX

Alex de Vaan

The shortage of skilled professionals is a Europe-wide issue, also present in Spain. With the help of AI, we will see greater automation of logistics operations, although well-trained people will always be essential for efficient, effective management of temperature-controlled storage, loading/unloading and transport of fresh and frozen goods.

Ángel González

There are many cases of highly successful automation in the sector. One of the earliest and most impressive was Mercadona's Ciempozuelos (Community of Madrid) facility. The company made clear that the investment was not primarily about cost savings but about improving working conditions —and that message resonated. Some facilities previously analysed solely from an ROI standpoint began to be developed for that reason.

We face a challenging situation in terms of labour, so we should continue the path set years ago: automate to improve working conditions.

David Moreno

The shortage of drivers in road transport has become a strategically important issue for the industry, and it affects both logistics operators and transport companies. The problem stems from various structural factors: an ageing workforce, lack of generational replacement and rising demand for logistics services amid globalisation and e-commerce. It is increasingly difficult to find qualified labour in general.

At ESP Solutions we are working to address this, including internal training programmes through a graduate scheme that retains most participants. Automation is essential not only due to labour shortages but also due to the cost efficiency demanded by the market.

We must join forces to tackle this challenge. Difficulty in finding and retaining qualified drivers compromises supply-chain efficiency, affects competitiveness and requires coordinated action by institutions, training centres and industry players to ensure the sector's long-term sustainability.

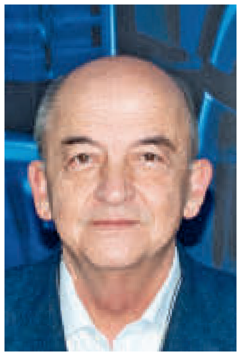
Montse Cobos

The need for increasingly qualified labour requires investment in training and talent retention. Our continuous pursuit of efficiency is leading us to implement automated solutions in temperature-controlled operations. At DHL Supply Chain, we are adopting advanced technologies such as IoT and planning systems that optimise processes, improve traceability and safeguard product integrity throughout the supply chain.

Carlos García

Technology contributes very positively to operations. AI helps with planning and process optimisation; sensors report anomalies and provide precise operational data; real-time thermal traceability systems and blockchain for data security are additional examples.

ÁNGEL GONZÁLEZ
Assistant to the CEO and Director of Institutional Relations, Ontime



“WE MUST BEGIN BY BEING ECONOMICALLY SUSTAINABLE”

DAVID MORENO
CEO, ESP Solutions Group

“THE SHORTAGE OF DRIVERS COMPROMISES LOGISTICS CHAINS”

Javier Jiménez

Yes, but key resources, especially transport equipment, still require drivers. And there are fewer of them every year.

Ángel de la Rosa

Yes. Automation is progressing across all logistics environments, including refrigerated platforms, where technical challenges are greater. At Alcampo we are analysing and implementing robotisation, assisted picking and autonomous vehicles, even in temperature-controlled environments, to improve efficiency, reduce errors and mitigate the impact of talent shortages. It is not only about reducing costs but making operations more robust and scalable.

> RISING ENERGY COSTS ARE ONE OF THE MAIN THREATS TO THE SECTOR. SHOULD COLD-CHAIN LOGISTICS BE GRANTED ELECTRO-INTENSIVE STATUS, LIKE STEEL OR CHEMICAL INDUSTRIES, TO REDUCE ELECTRICITY BILLS?

Andrés Valverde

In a context marked by energy price volatility, it is essential to recognise the strategic importance of cold-chain logistics, not only for its key role in supply chains, but also due to its high dependence on electricity, particularly in fleets, logistics platforms, warehouses and consolidation centres.

It is necessary and logical for the sector to be recognised as electro-intensive, since its activity depends heavily on electricity consumption to maintain the cold chain, especially in storage and transport of perishable goods. This would enable access to more competitive tariffs and compensation mechanisms similar to those available to other industrial sectors. It would also improve competitiveness, encourage investment in more efficient technologies and enhance stability in food and pharmaceutical supply chains. This recognition must come alongside a stable regulatory framework providing greater predictability for companies.

José Ramón Mazo

Maintaining refrigerated chambers at a constant temperature 24 hours a day requires significant energy consumption. At our main base in Alzira, for instance, we have 4,500 square metres dedicated to cold storage. We must emphasise that 95 per cent of our freight is food, much of it essential. And yet, our sector does not have access to the same compensation mechanisms as other electro-intensive industries, despite its essential role in society. It

(Continued on page 16)

Transporte XXI
December, 2025

SURVEY | CHALLENGES OF THE COLD CHAIN LOGISTICS

(From page 15)

would be positive to access similar support measures, such as electricity bill discounts. Meanwhile, we have invested in self-consumption and energy-efficiency solutions to reduce dependency: we installed 200 solar panels at Alzira to cut operating costs.

María Tena

It is a reasonable proposal. Electricity accounts for nearly 50 per cent of operating costs for many operators. Despite efficiency measures, energy-market volatility remains a major risk. The sector is therefore investing in self-consumption, demand-management and collective purchasing. Electro-intensive status would provide a fairer fiscal framework. Until then, the priority is reducing consumption and moving toward more sustainable and predictable energy models.

Marta Sánchez

Cold-chain logistics should absolutely be considered electro-intensive. Few sectors suffered as much as cold logistics during the blackout happened in Spain in April, and this should be taken into account.

Antonio Pérez

Cold-chain logistics is unquestionably energy-intensive. Both storage platforms and refrigerated vehicles require a constant energy supply to maintain an unbroken cold chain. In a context of rising energy costs, this dependency represents a structural risk to profitability and competitiveness. Recognising the cold chain as an electro-intensive sector could therefore be justified, allowing access to discounts or special tariffs similar to those in other industrial sectors.

Such classification would help lower energy bills and free up resources to invest in efficiency and sustainability —such as on-site renewable generation, advanced thermal insulation or low-impact refrigeration technologies. It would also reinforce supply-chain stability for sensitive products like food and medicine.

Alex de Vaan

Yes, it would be a very appropriate measure. Energy costs in the logistics sector have increased substantially in recent years, and any support would benefit companies across the board. At Grupo Caliche our focus on green energy includes the first "off-grid" logistics platform in Spain (in Murcia), powered by a sustainable energy-generation and storage system operating independently of the public grid.

Ángel González

According to Royal Decree 1106/2020, which regulates electro-intensive consumers in Spain, several operational conditions must be met —more or less difficult depending on variables such as positive or negative cold requirements, peak/off-peak hours, total annual consumption, and the relevance of Kilowatt-hour costs as a share of the facility's added value. Some cold-chain facilities may comply, others not. But those meeting criteria should benefit from the improved conditions that this designation entails.

What is astonishing is that the simplest step —having the European authorities include our CNAE (Clasificación Nacional de Actividades Económicas/ National Classification of Economic Activities) among those eligible— has not yet happened. This means we cannot even submit variables under the Royal Decree and cannot access benefits even if we qualify.

Our sector, especially at European level, is far less powerful than steel or chemicals, despite the ongoing efforts of associations like Aldefe to push for inclusion. But when the weakest sector is left out, public administration should be even more supportive, exerting pressure to ensure we have equal access to the same rules as others.

David Moreno

It would be of great help, because cold warehouses are major electricity consumers. Across our group we offer integrated temperature-controlled transport, full loads, storage and international groupage. We install photovoltaic panels to reduce electricity dependence, but we remain highly exposed to energy-price fluctuations. Furthermore, logistics facilities are located close to production areas in Spain's warmest regions, which increases energy consumption.

Montse Cobos

Regardless, the key issue is the commitment to reducing electricity consumption and using renewable energy. We are committed to sustainability and energy efficiency, and we are developing projects to optimise energy use in our operations. All our electricity is green, helping mitigate the impact of rising energy costs.

Carlos García

Yes, it is one of the proposals under consideration to allow cold-chain logistics to access lower electricity tariffs and reduce costs. Temperature-controlled transport moves perishable food, pharmaceuticals and materials requiring preservation. It is a highly sensitive and strategic service.

Javier Jiménez

Anything that helps is positive, especially for temperature-controlled warehouses. However, I do not believe rising energy costs are one of the sector's main threats, because such costs must inevitably be passed on quickly and systematically to the market.

Ángel de la Rosa

It is a debate worth having. Cold-chain logistics platforms consume large amounts of energy, especially in hot climates, and play an essential role in food supply. Assessing whether they should be considered electro-intensive consumers would help determine whether current tariffs and energy policies meet their needs and whether they could incentivise greater efficiency and sustainability. It is an issue that combines economic and medium-term operational viability.

> WHAT IMPACT DOES THE COMMITMENT TO SUSTAINABILITY HAVE ON THE COLD-CHAIN LOGISTICS SECTOR?

Andrés Valverde

Commitment to sustainability has a major impact on the cold chain. It is both a guarantee for the future and a first-order economic challenge.

Strategically, moving toward more sustainable logistics is unquestionably the right path. It means acting responsibly toward the environment, aligning with regulatory requirements and meeting social and market expectations. Improving energy efficiency, renewing fleets, adopting biofuels, implementing intermodal solutions and digitalising processes to reduce emissions are essential steps for long-term sustainability. However, this transformation brings a significant increase in operating costs. Investment in cleaner technologies, more efficient infrastructures and alternative fuels leaves companies with tight margins —and these costs often fall ultimately on the final consumer.

José Ramón Mazo

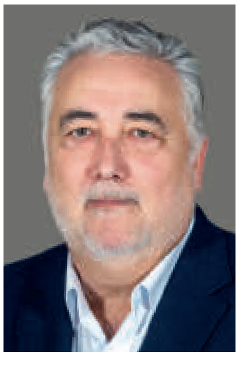
We cannot lag behind in the race to provide increasingly sustainable transport services.

In our case, continuous fleet renewal means increasingly efficient vehicles. We also rely on sea and rail to reduce road kilometres and cut our carbon footprint. At the same time, we must reduce empty kilometres and optimise loads, our sector's Achilles heel.

MONTSE COBOS
Key Account Manager, DHL Supply Chain

"INCREASED VEHICLE CAPACITY HAS A VERY POSITIVE IMPACT"

CARLOS GARCÍA
Secretary General, FVET



"SUSTAINABILITY IS NON-NEGOTIABLE"

María Tena

Sustainability is no longer optional: it is a strategic axis fundamentally transforming the logistics chain. The sector faces growing regulatory demands, market pressure and greater social awareness, all requiring rethinking of processes, from site design to refrigerants and energy management.

One major challenge is the climate impact of refrigerant leaks, which can have a global warming potential thousands of times greater than Carbon dioxide. A single kilogram of R-404A, for example, equals more than 3,900 kg of CO2. Ignoring these emissions —which are common in older trucks and equipment— would dramatically understate the real climate footprint of cold storage and transport.

For this reason, international standards such as ISO 14083 and programmes like Aecoc's Lean & Green require explicit inclusion of these emissions in carbon inventories. This helps drive effective mitigation: replacing high-GWP gases, electrifying refrigeration units, using advanced insulation and implementing monitoring systems that detect leaks and optimise consumption. Sustainability also drives efficiency, reducing food waste through better preservation and optimising routes and temperature settings can yield energy savings of 5–7 per cent.

In short, sustainable cold-chain logistics not only reduces environmental impact but also improves competitiveness, reduces operational risk and enhances sector reputation.

Marta Sánchez

Sustainability is on the agenda of every company in the sector, but it must be approached realistically, promoting measures that do not undermine economic sustainability. Steps like using duotrailers and megatrucks help unite environmental and economic sustainability, but in other areas this balance has not been achieved. It is urgent to adopt solutions with both kinds of sustainability in mind.

Antonio Pérez

Sustainability is profoundly reshaping the cold-chain logistics sector. Every link, from packaging design to transport and storage is being reassessed with environmental criteria in mind, driven by regulation and customer expectations.

In cold-chain operations, this translates into a strong focus on energy efficiency, emissions reduction and clean technologies. Key shifts include electrifying refrigerated fleets, installing solar-generation systems at logistics centres and optimising routes and loads as far as possible to avoid unnecessary trips.

This not only lowers carbon footprints but enhances resilience and brand reputation.

Alex de Vaan

It is a very important issue because today we are building tomorrow's world, and that requires unwavering dedication to sustainability. We installed solar panels at our platforms some time ago and operate only with the least-polluting engines available.

Ángel González

The cold-chain logistics sector is defined by sustainability —especially in the food perishables segment. Retailers increasingly use proximity and ecological attributes to differentiate products, and these become key selling points. But we must begin with economic sustainability, and the weakest parts of the chain, farmers and transport operators do not see the added costs of sustainable handling adequately compensated. This raises doubts about implementation.

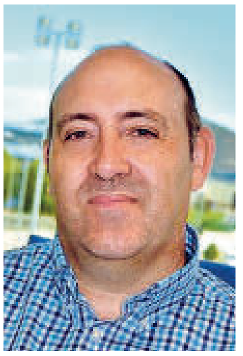
Even so, we are redefining the chain to deliver what the end consumer demands, and at Ontime we view this shift as an opportunity to further differentiate our integrated logistics offering through greater sustainability.

David Moreno

Logistics has a major sustainability impact because most transport is road-based and CO2 emissions are high. Logistics and transport companies have spent years improving sustainability performance. We aim to meet customer requirements for carbon-footprint reduction while maintaining minimum profitability. Sustainability is costly and the market is not always willing to absorb these costs.

Sustainability is not only a responsibility, but also a strategic opportunity to lead with purpose in the road transport sector. Integrating environmental, social and governance criteria at every level is not optional anymore; it is aligned with our long-term commitments. Committing to cleaner technologies, optimising operations and fostering a business culture of responsibility enables progress toward a more efficient, resilient and future-oriented logistics model.

JAVIER JIMÉNEZ
CEO,
Molinero Logística



"TRANSPORT IS A GROWING SECTOR"

ÁNGEL DE LA ROSA
Food Supply Chain Director,
Alcampo

"SUSTAINABILITY IS A KEY TRANSFORMATI ON AXIS "

At our group, projects like Lean & Green —part of our sustainability strategy— reduce carbon footprints annually, save fuel and lower accident rates. These initiatives support responsible mobility aligned with UN Sustainable Development Goals, positioning us as active agents of change. Their positive consequences benefit customers, partners and society as a whole.

Montse Cobos

Sustainability is at the core of our strategy. Our roadmap toward carbon neutrality by 2050 drives us to adopt greener practices in cold-chain logistics. This includes reducing empty space, using advanced temperature and humidity monitoring technologies and minimising waste.

These initiatives reduce environmental impact while ensuring product quality and freshness, critical for meeting customer expectations.

Carlos García

Sustainability is non-negotiable, and growth requires commitment to it. Transport operators are intensifying efforts to integrate sustainability across the chain: fewer routes, fleet renewal, green fuels... But to implement these changes, we need support from public authorities to enable a sustained and sustainable transition.

Javier Jiménez

It is difficult to answer, because logistics is highly dependent on people and experiences high staff turnover.

Regarding new alternative energies, strong investment is required and some technologies are not yet mature enough to justify such high costs —costs that the market is often unwilling to absorb.

Ángel de la Rosa

It is a key transformation axis. From packaging designed to optimise volume, to fleet renewal with alternative-fuel vehicles, to low-impact refrigerants and solar installations at logistics centres.

At Alcampo we follow a clear roadmap to more sustainable logistics, including cold chain, aligned with our decarbonisation and energy-efficiency commitments.

Transporte XXI
December, 2025

SUPPLY CHAIN | ROAD TRANSPORT

AT THE FOREFRONT

SPANISH TEMPERATURE-CONTROLLED TRANSPORT MAINTAINS ITS EUROPEAN LEADERSHIP DESPITE THE ECONOMIC SLOWDOWN, THANKS TO FLEET RENEWAL, TECHNOLOGICAL INNOVATION AND ITS STRATEGIC ROLE IN THE AGRI-FOOD CHAIN

Spanish temperature-controlled transport remains one of the strongest sectors within the European logistics landscape. Despite the widespread downturn that affected road freight transport in 2023, this segment has demonstrated remarkable resilience, supported by an increasingly professionalised business structure and sustained investment in modernisation and sustainability.

With turnover of 6.346 billion in 2023, temperature-controlled transport accounts for 22 per cent of the total road freight business in Spain, according to the 2025 edition of the Libro Blanco de Transporte por Carretera y Logística, published annually by Transporte XXI. Although this represents a 2 per cent drop compared with 2022, the sector has grown by more than 24.5 per cent since 2019, consolidating a medium-term upward trend.

6.346
BILLION EUROS, SECTOR TURNOVER IN 2023

Operators specialising in refrigerated cargo have adapted quickly to an environment marked by cost pressures, volatile consumption and a geopolitical climate that has strained European supply chains. Even so, “frigo” operators achieved net profits of barely 50 million in 2023, translating into a margin of just 0.8 per cent —far too narrow for such a highly specialised activity.

Modern and Efficient

The Spanish temperature-controlled fleet has earned a reputation for being one of the most modern and efficient in Europe. Its renewal cycle averages 48 months, allowing for the systematic incorporation of technological improvements in line with the sustainability and digitalisation standards demanded by shippers and institutions. Investment efforts have been reinforced in recent years by European funds, scrappage programmes and the entry of private capital.

Today, more than 500 companies make up this subsector, although fragmentation remains high. A total of 26 large companies account for 45 per cent of total revenue, led by three major players: Primafrio, Transportes J. Carrión and Lineage Spain Transportation, which, at the close of this edition, has returned to the hands of Fuentes.

Primafrio tops the ranking with revenues of almost 619 million in 2023 (+3 per cent). Its focus on route expansion, operational innovation and continuous improvement has

SPAIN RENEWS ITS TEMPERATURE-CONTROLLED FLEET EVERY 48 MONTHS

helped cushion the impact of an unfavourable environment.

This professionalisation has been accompanied by growing interest from in-

Fleet quality is a hallmark of the sector in Spain

vestment funds, major logistics operators and retail chains seeking to secure supply through stable alliances with specialised hauliers. This trend is helping to accelerate the digitalisation of processes and the sector's commitment to decarbonisation—two of its major challenges for the coming years.

However, the sector still faces structural problems that threaten to slow progress. The shortage of professional drivers remains a persistent concern, as does the lack of regulatory harmonisation between European and non-EU countries, which creates competitive distortions.

In addition, the strong link with the agri-food sector and the seasonality of export flows to Europe create a dependency that leaves fleets vulnerable to adverse weather events or a drop in external demand.

The economic conditions of 2023 also reflect this climate of tension. Although the price of professional diesel fell by 11 per cent compared with 2022, it remains 30 per cent higher than pre-pandemic levels. This pressure on margins, combined with rising financial costs due to higher interest rates, has eroded net profits, which plunged by 79 per cent year-on-year.

30%

MORE EXPENSIVE, THE PRICE OF DIESEL COMPARED WITH 2020

Despite all this, temperature-controlled transport has managed to remain an essential vector in the logistics of perishable goods, showing strategic strength compared with other segments of transport that have also suffered sharp declines, such as road container transport.

A Key Component

"Its capacity for adaptation, its reputation for quality and its role in agri-food export" consolidate its position as a key component in the European supply chain, according to analysts consulted by this newspaper. Looking ahead to 2025, the challenge will be to continue advancing towards decarbonised logistics without losing competitiveness or efficiency. Achieving this will require closer collaboration between hauliers, shippers and institutions—cooperation essential for sharing the investment burden and ensuring the continuity of a successful model that continues to set the standard in European transport.

Refrigerated trailer by Krone for Transportes J. Cano.

SUPPLY CHAIN | ROAD TRANSPORT

THE SEMI-TRAILER RETURNS TO GROWTH

TEMPERATURE-CONTROLLED TRANSPORT REGISTRATIONS ROSE 3% LAST YEAR, EXCEEDING 4,700 UNITS

The temperature-controlled transport fleet returned to positive territory last year, rising by 3 per cent after registering 4,713 semi-trailers, according to data from the industry association Asfares (Asociación Española de Fabricantes de Remolques y Semirremolques, Cisternas y Vehículos Análogos).

However, the trend has reversed again during the first half of the current year. “Frigo” units suffered an 8.5 per cent decline after recording 1,764 registrations. The outlook for the temperature-controlled segment in the second half also anticipates a slight drop compared with the previous year, stabilising at around 4,500 units annually.

Schmitz Cargobull Ibérica consolidated its dominance in the refrigerated segment last year, delivering 1,438 units and achieving a 30.9 per cent market share, along with year-on-year growth of 7.7 per cent.

Following behind, Lecitrailer secured a 21.77 per cent share in refrigerated trailers after registering more than one thousand units. The company, with 27 years of experience in the Spanish trailer and semi-trailer market, carried out an 8.8 million investment in 2024 to install a new welding robot and a new fibre laser cutting station.

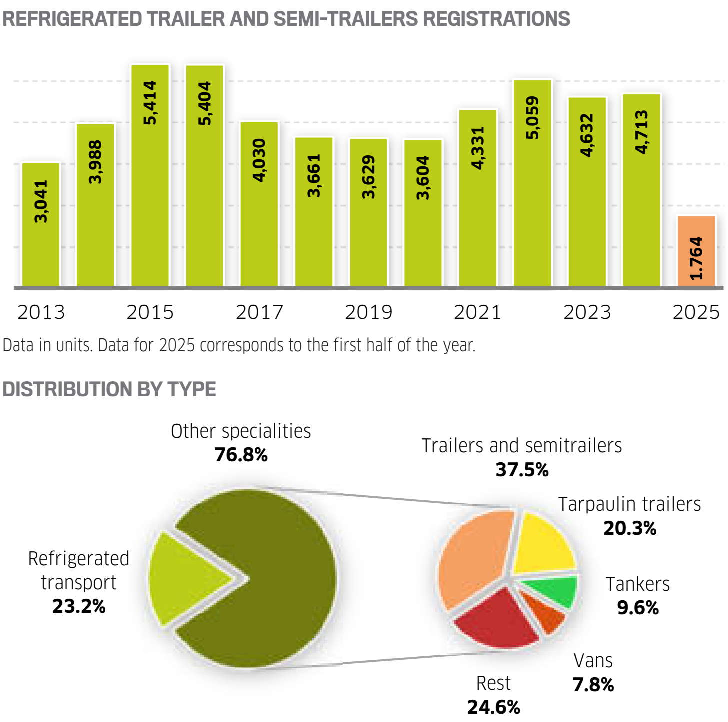
In panel production, additional vacuum tables have been added to increase manufacturing capacity, and a new three-dimensional cutting machine has been incorporated.

Meanwhile, registrations of trailers and semi-trailers over 10 tonnes in 2024 reached 15,009 units, 6.3 per cent more than the 14,116 recorded the previous year. This volume was surpassed only once in the past 16 years —in 2016— according to Asfares.

By manufacturer, Lecitrailer retained first place with a 24.8 per cent market share, followed by Schmitz with 23.4 per cent and Krone with 7.2 per cent.They are followed by two refrigerated-trailer manufacturers: Indetruck, with 901 registrations and a 6 per cent share, and Sor Ibérica with 731 units, representing 4.9 per cent.

THE FIRST HALF OF 2025 RETURNS TO DECLINE

The rise recorded in 2024 has failed to maintain momentum. “Frigo” units show an 8.5% drop in cumulative registrations up to June.



Source: Asfares.


Taking part in change
An evolving SMART hub
Transparent
Sustainable
Efficient
Connected
Port de Barcelona
www.portdebarcelona.cat

SUPPLY CHAIN | ROAD TRANSPORT

ELECTRIC IDLING

COLD-CHAIN OPERATORS DELAY THE TRANSITION TO ZERO-EMISSION TRUCKS AMID THE LACK OF PUBLIC SUPPORT FOR FLEET RENEWAL

The push to advance towards zero-emission road transport —primarily through electrification— continues at a slow pace. “Progress remains very slow and limited, with barely 1.2 per cent penetration of electrified heavy vehicles, and in the case of vans, just 4.3 per cent of the total market,” the Asociación Española de Fabricantes de Automóviles y Camiones (Anfac) highlighted last July.

Anfac’s CEO José López-Tafall lamented that “there has not been a single support plan for industrial vehicles since May 2024. Heavy vehicles are the great forgotten element of decarbonisation, despite Spain being a major economy that sells and imports extensively within Europe, making international road freight transport essential for our country.”

JOSÉ LÓPEZ-TAFALL
General Manager
Anfac

“HEAVY VEHICLES ARE THE GREAT FORGOTTEN ELEMENT OF ZERO EMISSIONS”

Within this context —where the electric motor continues at idle— various cold-chain operators are nonetheless pushing ahead with technological transition. Transnugon, acquired this year by Logística Carosán, reached an agreement at the end of last year with PragmaCharge to incorporate 25 electric trucks over the next five years under a leasing model. Likewise, Valencian operator Grupo Torres has also signed an agreement with the same British firm to lease ten trucks, the first two arriving this year. The fleet-electrification provider has ordered 12 Mercedes-Benz eActros 600 units this year to supply these two clients.

Transportes Cruz has incorporated its first electric truck.

Murcian haulier TLX, serving Consum, has added six Volvo FH Aero Electric units, two Mercedes-Benz Trucks eActros 300 models, as well as last-mile vehicles from JAC Motors.

Navarre-based Transportes Cruz has also brought its first electric truck into service this year —a Renault Trucks E-Tech— assigned to its operations for frozen-food producer Gelagri Ibérica.

DFM Logística, part of Grupo Disfrimur, incorporated its first rigid electric truck in 2024 into the fleet operating within the Stef Iberia transport network in Murcia province.

In turn, Grupo Mazo has conducted trials in recent months with the Mercedes-Benz eActros electric truck to evaluate performance on real-world transport routes.

In the field of renewable hydrogen, Carreras Grupo Logístico is participating in a pilot project with EVARM, Repsol and Zoilo Ríos to test its use in a truck that also runs on renewable diesel, with real customers. The initiative begins with short routes from Zaragoza and will later extend to longer routes connecting Barcelona and Madrid.

The need to diversify technologies in order to decarbonise refrigerated transport is reflected once again in the strategy pur-

sued by Disfrimur, which operates five propulsion systems developed by Scania to reduce environmental impact on the road. These include diesel engines running on hydrotreated vegetable oil (HVO) and conventional diesel; trucks powered by natural gas and biomethane (CBG and LBG); and battery-electric vehicles.

ESP Solutions is also committed to multiple pathways to progress in sustainability, using liquefied natural gas (LNG) as well as HVO. For the latter, it has obtained Control Union certification for its supply after meeting the requirements set under the Sustainable Bioenergy Standard (SBS).

THE SECTOR IS BACKING BIOMETHANE, LNG AND HVO

Meanwhile, HVO continues its steady expansion within Spanish temperature-controlled road transport, with additional operators such as Valencian haulier Armesa Logística Internacional, Murcian company Orvipal and León-based ROR adopting this fuel. They join other pioneers —including Joanca, Lodisna and Marcotran— that were already using it.

AERODYNAMICS

For fleet renewals and expansions, major temperature-controlled road transport operators are opting for heavy vehicles featuring aerodynamic designs and advanced technologies—such as CMS camera-based mirror systems—to improve fuel efficiency and achieve significant reductions in carbon emissions.
Primafrio has renewed its fleet with the addition of 300 Volvo FH Aero units from Volvo Trucks. This model has also been chosen by Catalan transport agency Trota, which has ordered 150 vehicles. In addition, Logista and its subsidiary Transportes EL Mosca, Grupo Transonuba (GTO) and Almeria-based Traninternao, operating under the commercial brand J.Cano, are modernising their respective fleets with the acquisition of around one hundred trucks each.

TransporteXXI
December, 2025

SUPPLY CHAIN | COLD LOGISTICS COMPANY RANKINGS

COLD-CHAIN LOGISTICS LOSES TRACTION

COMPANIES IN THIS SEGMENT CUT THEIR REVENUE BY 1% IN 2023 DUE TO FALLING ROAD-TRANSPORT SALES, WHICH ACCOUNT FOR 75% OF THE TOTAL

Cold-chain logistics broke its growth trend in 2023, a difficult year for Spanish agriculture. The main causes are well known: geopolitical tensions, climate change, inflation and falling consumption —a "perfect storm" that hit profit and loss accounts head-on.

Road refrigerated transport companies and logistics operators specialising in this activity generated close to 8.5 billion in the year analysed, 1 per cent less than in 2022. The positive performance of logistics (+1.9 per cent) was not enough to offset the drop in road-transport turnover (-1.9 per cent). Even so, sector revenue stands almost 24 per cent above pre-pandemic levels, reflecting the strong post-COVID recovery.

These findings are drawn from the Libro Blanco de la Carretera y Logística (White Book of Overland logistics and Logistic operators), published annually by Transporte XXI, which for its 2025 edition analysed a sample of more than 6,600 companies, 642 of which focus their core business on temperature-controlled storage and transport. This specialisation accounts for 22 per cent of total sales in the combined road freight and logistics-operator sector, which closed 2023 with revenue of 31.5 billion.

SECTOR SALES ARE UP 24% COMPARED WITH PRE-COVID LEVELS

The lion's share goes to trucking —the partner par excellence of Spain's fruit-and-vegetable industry for exporting its produce abroad.

Refrigerated road transport, with revenue of 6.346 billion in 2023, represents 75 per cent of the total.

These sales consolidate this specialisation as the second-largest segment in the sector, with a 22 per cent share, surpassed only by full-load and groupage cargo.

The results —analysed in greater detail in our White Book of Overland logistics and Logistic operators— reflect the challenges the business faced in a difficult 2023. Refrigerated transport achieved net profits of barely 50 million, translating into a margin of 0.8 per cent —far too narrow for such a highly specialised activity. "Refrigerated transport was affected by weak campaigns and the difficulty of attracting professionals to a segment where international transport is the main activity," explained the president of CETM, Carmelo González.

Meanwhile, logistics operators' share, with revenue of 2.149 billion, stands at 25 per cent.

The ranking of companies specialising in cold-chain logis-

SIZE DOESN'T MATTER

SMEs account for 85% of companies in the sample. They generated €4.358 billion in sales in 2023, representing 51% of the market. There are only 34 large companies, accounting for the remaining 49% of revenue.

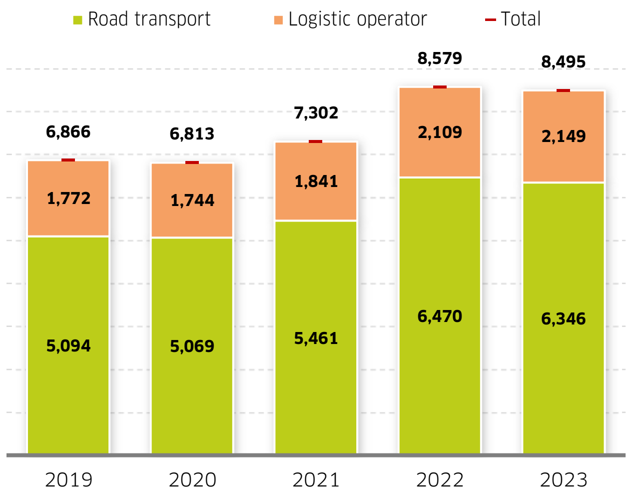
	2023			2022			2019		
	NO.	SALES	SHARE	NO.	SALES	SHARE	NO.	SALES	SHARE
TOTAL (year-on-year)	**642**	**8,495**		**642**	**8,579**		**642**	**6,866**	
Big	34	4,137	49%	32	3,991	47%	24	2,829	41%
SME	547	4,358	51%	573	4,588	53%	605	4,038	59%
Medium	172	3,018	36%	177	3,154	37%	175	2,640	38%
Small	330	1,324	16%	352	1,417	17%	385	1,381	20%
Micro	45	16	0%	44	18	0%	45	17	0%
Extinguished / Inactive	61	-		37	-		13	-	

Figures in millions of euros. Source: Transporte XXI.

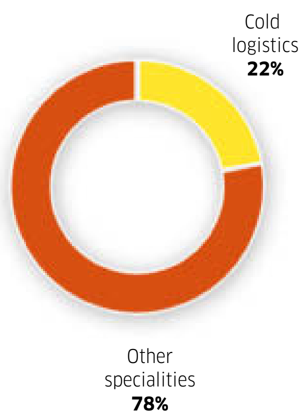
BUSINESS STALLS

Cold-chain logistics–representing 22% of total sales in the road freight and logistics-operator sector–broke its growth trend in 2023, with sales falling slightly by 1%.

EVOLUTION



SHARE 2023



Figures in millions of euros. Source: Transporte XXI.

tics is led by Primafrio, Spain's top road-transport operator. The Murcia-based company, run by the Conesa family, generated revenue of more than 618 million —3 per cent more than the year before. Compared with 2019, the pre-pandemic benchmark, sales have risen by 47 per cent.

LOGISTICS OPERATORS HOLD A 25% SHARE

Next in line are logistics operators DHL Exel Supply Chain Spain, with revenue of 446 million (-2 per cent), and STEF Iberia, which exceeded 282 million, 7 per cent more than in 2022.

In fourth place is Transportes J. Carrión, Spain's second-largest refrigerated road haulier. The Almeria-based company reported turnover of 276.5 million in 2023, an 8 per cent increase.

One of the standout performers in the ranking is Logista Pharma, which grew 13 per cent in 2023 and 79 per cent since 2019. The logistics operator, specialising in pharmaceutical distribution, closes the top five with 220.8 million in sales.

FROM FIELD TO SHELF

Murcia and Andalusia, which together export half of all Spanish fruit and vegetable shipments (50%), lead the revenue ranking with €3.573 billion, representing 42% of Spain's cold-chain logistics business.

COMMUNITY	COMPANIES	2023	%23/22	%23/19	2022	2021	2020	2019	EMPLOYMENT	SHARE SALES	SHARE EXPORTS
Murcia	92	1,884	-1%	+30%	1,909	1,659	1,501	1,450	6,408	22%	19%
Andalusia	125	1,689	+0%	+24%	1,685	1,396	1,310	1,365	10,049	20%	31%
Madrid Cmty.	42	1,543	+1%	+26%	1,529	1,254	1,174	1,229	9,210	18%	1%
Valencian Cmty.	88	983	-4%	+20%	1,019	872	814	816	4,577	12%	27%
Catalonia	73	823	-2%	+21%	839	785	719	678	3,848	10%	8%
Galicia	46	326	-5%	+14%	343	299	273	286	1,761	4%	1%
País Vasco	23	299	-1%	+41%	302	242	216	212	1,535	4%	1%
Castilla - La Mancha	23	282	-2%	+16%	286	219	258	244	2,118	3%	2%
Aragon	23	171	+4%	+19%	164	140	129	144	1,136	2%	2%
Castilla and Leon	24	130	-7%	-6%	139	131	132	138	1,258	2%	2%
Navarre	13	111	+1%	+23%	110	89	90	90	571	1%	3%
Balearic Islands	11	62	-0%	+10%	63	53	43	57	442	1%	0%
Asturias	15	46	-2%	+15%	48	40	39	40	316	1%	0%
Cantabria	8	46	-2%	+22%	47	42	39	38	501	1%	0%
La Rioja	10	42	+3%	+34%	41	34	33	32	385	0%	0%
Canary Islands	18	39	+10%	+23%	36	31	30	32	334	0%	0%
Extremadura	8	19	+2%	+16%	18	16	15	16	162	0%	2%
TOTAL	**642**	**8,495**	**-1%**	**+24%**	**8,579**	**7,302**	**6,813**	**6,866**	**44,611**	**100%**	**100%**

Figures in millions of euros. *Sales share: Market share of the national total in 2023. Export share: Share of exports of fruit and vegetable products in 2023 (by weight). Source: Transporte XXI.

As for geographic distribution, the Mediterranean corridor is the clear standout. The Region of Murcia tops the ranking of autonomous communities by sales, with a 22 per cent share. In fact, four companies from this region appear in the top 10: Primafrio, the leader; Lineage Spain Transportation (which, at the close of this edition, has returned to the hands of Fuentes); A.T. La Espada; and Grupo Caliche. The region's 92 companies recorded revenue of 1.884 billion in 2023, 1 per cent less than the previous year. In second place is Andalusia, with 125 companies and revenue of 1.689 billion.

REFRIGERATED TRANSPORT COMPANIES IN SPAIN | RANKING BY SALES IN 2023

RK	COMPANY	SPECIALITY	PROVINCE	YEAR OF EST.	SALES 2023	SALES %23/22	SALES %23/19	SALES 2022	SALES 2021	Results	Assets	Workforce
1	Primafrio SL	Road transport	Murcia	1999	618.89	+3%	+47%	600.56	511.42	-118.37	780.69	451
2	DHL Exel Supply Chain Spain SL	Logistic Operator	Madrid	1984	445.91	-2%	+5%	454.13	419.94	12.50	35.89	3.596
3	STEF Iberia SA	Logistic Operator	Madrid	1989	282.37	+7%	+32%	264.19	218.88	17.38	114.75	1.527
4	Transportes J Carrión SA	Road transport	Almería	1980	276.53	+8%	+10%	255.17	204.40	-2.60	19.30	2.064
5	Logista Pharma SA	Logistic Operator	Madrid	1998	220.81	+13%	+79%	194.93	170.05	9.34	10.48	501
6	Salvesen Logística SA	Logistic Operator	Madrid	1996	181.50	+5%	+20%	172.47	137.26	5.76	7.62	1.208
7	Lineage Spain Transportation SL	Road transport	Murcia	1992	175.18	-5%	+11%	183.50	170.83	5.24	20.81	868
8	AT La Espada SL	Road transport	Murcia	2000	146.30	+7%	+87%	137.29	108.82	2.33	11.49	127
9	Transportes Grupo Caliche SL	Road transport	Murcia	1987	130.08	+5%	+65%	123.47	100.93	3.17	20.34	250
10	Isabel Alonso Alonso SL	Road transport	Almería	1999	129.01	+7%	+73%	120.95	96.37	2.27	32.55	494
11	Grupo Transonuba SL	Road transport	Huelva	1985	123.97	-2%	+24%	126.18	113.27	1.36	10.19	197
12	Hermes Logística SA	Road transport	Barcelona	1982	117.02	+0%	+110%	116.49	104.38	2.16	12.64	194
13	Transportes Mazo Hermanos SA	Road transport	Valencia	1972	112.96	-1%	+7%	114.29	100.50	0.57	42.86	519
14	Sabetrans SL	Road transport	Huelva	1987	109.92	-2%	+89%	111.91	92.71	1.13	31.21	732
15	Agencia Transportes Trota SA	Road transport	Lleida	1984	104.68	-2%	+36%	106.38	87.49	2.41	16.72	474
16	Delgo Operador de Transporte SL	Road transport	Valencia	2007	92.51	+8%	+155%	86.03	63.01	0.90	5.15	549
17	Transintercano SL	Road transport	Almería	1991	73.56	-5%	+17%	77.33	70.19	6.47	54.64	563
18	Molinero Logística SL	Logistic Operator	Soria	1989	72.13	-5%	-4%	75.82	71.64	1.01	11.06	778
19	Transportes Penades e Hijos SL	Road transport	Albacete	1987	66.52	-1%	+76%	67.29	46.35	0.82	10.21	565
20	Tudefrigo SL	Road transport	Gipuzkoa	1993	65.37	-4%	+74%	68.10	50.62	0.10	4.66	240
21	Disfrimur SL	Road transport	Murcia	1997	63.08	+1%	+6%	62.26	56.61	1.03	9.23	798
22	Explotación Internacional de Transportes SL	Road transport	Alicante	1965	n.a.	-	-	s.d.	56.36	0.88	1.78	200
23	Galadtrans 2009 SL	Road transport	Castellón	2009	54.88	-7%	+16%	58.77	47.93	0.63	2.87	53
24	Zolve España Logística y Transporte SA	Road transport	Madrid	1990	n.a.	-	-	53.39	10.63	1.49	7.22	228
25	Olano Seafood Ibérica SA	Road transport	Gipuzkoa	1989	52.72	+1%	+20%	52.41	45.51	2.62	8.89	79
26	Campillo Palmera SL	Road transport	Murcia	2012	50.54	+2%	+14%	49.69	42.41	1.90	17.16	231
27	Fresh & Carry SA	Road transport	Murcia	1998	49.99	+4%	+107%	48.06	37.76	0.41	1.95	14
28	Europe Transport Logistic SL	Road transport	Valencia	2016	49.93	+4%	+18%	47.91	44.34	0.21	1.98	25
29	Francisco Pérez Rodríguez SA	Road transport	Almería	1986	47.43	+3%	+68%	45.95	36.88	0.75	4.26	250
30	Castillo Trans SA	Road transport	Alicante	1983	44.37	-4%	-6%	46.13	44.44	0.39	9.07	357
31	Picking Farma SA	Logistic Operator	Barcelona	1998	43.22	+42%	+95%	30.36	25.63	2.54	22.98	148
32	Aralogic SL	Road transport	Zaragoza	2006	42.86	+7%	+37%	40.20	32.89	0.49	2.64	201
33	Transportes Eurocruz SL	Road transport	Murcia	1996	n.a.	-	-	40.13	40.38	0.26	7.59	223
34	Transportes Cruz SL	Road transport	Navarra	1975	39.24	+37%	+74%	28.65	24.51	1.32	13.04	187
35	Juan Francisco Aranda SL	Road transport	Granada	1994	39.12	-3%	+63%	40.42	29.83	2.01	14.34	272
36	Servicios Combinados de Logística y Distribución SL	Logistic Operator	Valencia	1998	38.49	+26%	+227%	30.67	20.69	0.95	2.41	120
37	Olano Seafood SL	Logistic Operator	Gipuzkoa	2001	37.35	-3%	+45%	38.53	31.04	2.61	8.46	116
38	Capitrans SL	Road transport	Murcia	1992	37.17	-1%	+12%	37.56	32.70	1.73	7.97	186
39	Transportes Frigoríficos Narval SL	Road transport	Madrid	1998	37.16	+5%	+41%	35.49	29.79	0.11	2.06	212
40	Operadores Logísticos del Mediterráneo SA	Logistic Operator	Murcia	1992	36.68	+2%	+20%	35.97	32.94	0.10	2.87	55
41	Brivio & Vigano España SL	Road transport	Madrid	2018	35.73	+21%	+197%	29.56	19.10	1.80	4.79	90
42	Agetrans Demetrio e Hijos SL	Road transport	Murcia	2000	35.25	+1%	+56%	34.73	27.91	0.32	4.07	271
43	Alloga Logística (España) SL	Logistic Operator	Toledo	1997	34.86	-2%	+107%	35.52	22.75	0.57	6.94	263
44	Transfrío Rías Baixas SL	Road transport	Pontevedra	2016	34.66	-3%	+60%	35.72	27.12	0.64	4.35	128
45	Inter Trans Pérez Casquet SL	Road transport	Almería	1999	34.65	+6%	+41%	32.72	30.32	0.81	9.56	278
46	Ondara Logística SL	Logistic Operator	Lleida	2002	34.20	+16%	+71%	29.39	25.04	0.53	6.47	59
47	Mascaró Morera SL	Road transport	Baleares	1995	34.12	+7%	+72%	31.77	24.15	1.51	4.70	196
48	Transfrired SL	Road transport	Cuenca	2003	34.06	+2%	+57%	33.52	27.70	0.84	4.52	205
49	STEF Los Olivos SA	Logistic Operator	Madrid	1988	33.63	-17%	+106%	40.70	30.23	1.83	4.43	421
50	Transportes Hermanos Corredor SA	Road transport	Murcia	1982	32.81	-1%	+38%	33.01	26.01	0.44	6.70	173
51	Montfrisa SA	Logistic Operator	Madrid	1964	32.70	+2%	+23%	32.00	26.90	1.58	4.92	264
52	Transmoro SL	Road transport	Huelva	1992	31.76	-21%	+145%	40.29	21.42	0.21	3.27	317
53	Frío Nature Almería SL	Road transport	Almería	2012	31.16	+8%	+104%	28.88	22.33	0.86	3.66	11
54	Agencia Transportes Robles SA	Road transport	Lleida	1985	31.13	+14%	+40%	27.42	23.95	0.58	2.47	326
55	Transportes Tresserras SA	Road transport	Girona	1947	30.14	-11%	-2%	34.02	29.17	0.23	3.25	113
56	Olano Norte SL	Road transport	Gipuzkoa	2017	29.85	-0%	+172%	29.95	17.16	1.41	4.58	198
57	Trans Jaylo SA	Road transport	Navarra	1995	27.31	-19%	+21%	33.90	25.46	2.82	16.45	178
58	Transportes J Prats SA	Road transport	Girona	1980	27.19	-6%	+14%	28.81	23.19	0.40	5.42	84
59	José Guillén e Hijos SL	Logistic Operator	Murcia	1991	27.17	-33%	-29%	40.80	45.72	0.51	11.39	155
60	Logifrío Gestión Frigorífica SL	Logistic Operator	Madrid	2002	n.a.	-	-	26.69	s.d.	-0.10	0.29	1

REFRIGERATED TRANSPORT COMPANIES IN SPAIN | RANKING BY SALES IN 2023

				YEAR	SALES							
RK	COMPANY	SPECIALITY	PROVINCE	OF EST.	2023	%23/22	%23/19	2022	2021	Results	Assets	Workforce
61	Logidis Sistems SL	Road transport	Almería	1997	26.42	+20%	+16%	21.99	18.92	0.13	2.42	20
62	Serfri Trucks SA	Road transport	Murcia	2007	26.32	-15%	+41%	30.79	24.87	0.36	2.69	23
63	Grupo Penta Logis SL	Road transport	Madrid	2022	26.30	+122%	-	11.84	0	0.41	9.11	306
64	STEF Transportes Frigoríficos SA	Road transport	Madrid	1967	25.52	+27%	+151%	20.07	9.37	0.48	3.16	130
65	Hervián SL	Road transport	Murcia	1991	25.14	-5%	+27%	26.40	22.43	0.46	6.75	251
66	Organización Farmacéutica SA	Logistic Operator	Guadalajara	1987	24.94	-14%	+20%	28.84	25.09	0.10	15.31	199
67	Trans Manolet SL	Road transport	Alicante	1983	24.71	-5%	+10%	25.98	23.23	1.17	8.87	163
68	Indapak Logistic SL	Road transport	Almería	2002	24.43	-7%	-7%	26.26	25.46	0.65	6.67	11
69	Rafa Grau Transports SL	Road transport	Valencia	2014	24.40	+11%	+72%	21.95	19.89	0.13	1.45	149
70	Fredist SL	Logistic Operator	Barcelona	2002	23.64	+11%	+94%	21.31	16.27	1.94	7.71	59
71	Distribuciones y Representaciones Usieto SA	Road transport	Zaragoza	1988	23.63	+12%	+43%	21.14	16.95	1.75	19.70	112
72	Rau Load Cargo Barcelona SL	Road transport	Valencia	1998	23.61	-10%	+25%	26.11	20.17	0.81	0.88	19
73	Transportes Vigar SL	Road transport	Sevilla	1990	23.56	-4%	+27%	24.54	19.81	0.88	16.51	201
74	B Braun Logistics SL	Logistic Operator	Tarragona	2000	23.35	+2%	+16%	22.98	19.79	0.26	3.31	76
75	Innova Logic Transportes SL	Road transport	Valencia	2006	23.08	+18%	+85%	19.57	13.96	0.51	2.16	99
76	Movianto España SL	Logistic Operator	Madrid	2000	n.a.	-	-	22.64	19.92	1.49	11.86	98
77	Olano Levante SA	Road transport	Albacete	1967	n.a.	-	-	22.63	17.37	-1.15	1.38	133
78	Vimifar SA	Logistic Operator	Barcelona	1987	21.79	-1%	+6%	22.01	27.53	0.35	3.49	20
79	Transportes Pibejo SL	Road transport	Madrid	1995	n.a.	-	-	21.77	18.04	1.11	2.22	74
80	Euroloma SL	Road transport	Murcia	1993	21.52	-2%	+12%	22.00	19.67	0.93	9.82	95
81	Transportes y Excavaciones Valiente SL	Road transport	Sevilla	1993	21.23	-5%	+17%	22.28	18.50	0.67	5.76	53
82	SA Transvasa	Road transport	Cantabria	1978	21.22	-4%	+26%	22.07	18.74	2.44	18.75	40
83	Antonio Marco SL	Road transport	Alicante	1985	20.86	+8%	+42%	19.28	17.20	0.46	2.87	136
84	Transportes Internacionales Eurotransfret SL	Road transport	Alicante	2009	20.84	-18%	+33%	25.55	24.04	-1.38	0.70	177
85	Transportes Piadela SL	Road transport	Coruña	1990	20.82	+4%	+27%	20.02	17.09	1.25	9.92	63
86	Trans Frío Higueral SL	Road transport	Almería	1997	20.77	+4%	+26%	20.03	17.72	0.80	6.58	201
87	Tradomi SL	Road transport	Murcia	1996	20.00	-1%	+45%	20.14	15.50	1.19	6.11	153
88	Transportes Sáez SL	Road transport	La Rioja	1989	19.92	+11%	+55%	17.86	14.17	2.57	7.27	146
89	Inter Cañabate SL	Road transport	Almería	1995	19.46	-3%	+0%	19.99	17.01	0.40	6.10	12
90	Antonio Marfil SL	Road transport	Málaga	1996	n.a.	-	-	19.35	17.19	2.42	7.18	190
91	S Cabrera SL	Road transport	Almería	1991	n.a.	-	-	19.22	15.16	1.22	16.41	142
92	Interfrive SA	Road transport	Almería	1994	19.20	-0%	-6%	19.26	16.91	1.20	16.44	186
93	Transportes Valín e Hijos SA	Road transport	Lugo	1988	19.12	+5%	+4%	18.23	15.66	0.18	4.21	150
94	Frigorificos de Vigo SA	Logistic Operator	Pontevedra	1940	18.92	-13%	-8%	21.85	21.89	1.29	10.63	102
95	Frigo Líneas Nórdicas SL	Road transport	Almería	2005	n.a.	-	-	18.83	15.24	1.43	11.72	117
96	Cosoltrans Logística y Expedición SL	Road transport	Murcia	2006	18.73	-24%	-30%	24.52	23.92	0.19	2.08	34
97	Getru Logística SL	Road transport	Valencia	2011	18.68	+6%	+60%	17.59	13.97	0.03	0.52	138
98	Kronofrío Logistics SL	Logistic Operator	Alicante	2012	18.62	+17%	+74%	15.92	12.49	0.16	0.95	125
99	Rau Load Cargo SL	Road transport	Valencia	1993	18.58	-27%	-13%	25.31	23.10	0.32	2.18	30
100	Armesa Logística Internacional SA	Road transport	Valencia	2013	18.55	-6%	+1%	19.83	19.19	0.73	3.78	17
101	TAE Transports i Serveis Integrals SL	Road transport	Barcelona	1995	18.48	-7%	-17%	19.92	19.96	0.19	4.75	126
102	Garvasa Logística SL	Logistic Operator	Cantabria	2002	18.38	+9%	+47%	16.84	15.84	1.68	19.37	386
103	Transportes Frigoríficos Solocanarias SL	Road transport	Sevilla	2001	18.34	+7%	+63%	17.08	11.85	0.40	2.06	46
104	Alianza Galadtrans SL	Road transport	Castellón	2012	18.24	+35%	+37%	13.48	13.19	0.61	0.86	17
105	Rau Load Cargo Marítima SL	Road transport	Valencia	2004	17.85	-8%	+34%	19.32	17.11	0.59	0.66	23
106	Transportes el Mirador Miratrans SL	Road transport	Murcia	1995	17.51	-10%	+27%	19.42	15.48	0.23	2.02	125
107	Farmavenix SA	Logistic Operator	Guadalajara	2004	17.25	-4%	+13%	18.01	16.60	0.36	9.41	169
108	Trans Rocamar SL	Road transport	Valencia	1977	n.a.	-	-	17.07	14.51	0.93	11.10	91
109	Disalfarm SA	Logistic Operator	Barcelona	1998	16.68	+3%	+14%	16.13	14.75	0.31	5.78	64
110	Grupo Salas Águila SL	Road transport	Almería	1994	16.61	-5%	+29%	17.45	13.76	0.97	8.64	145
111	Pharma Logistics Solutions SL	Road transport	Cádiz	2014	16.49	+74%	>999%	9.50	4.93	0.28	0.79	185
112	Devesa Express SL	Road transport	Gipuzkoa	1997	16.45	-1%	+22%	16.55	11.97	0.65	3.90	87
113	Orcelitrans SL	Road transport	Alicante	1996	16.38	+41%	+99%	11.63	8.26	0.06	1.05	130
114	Antonio Gijón Operador del Transporte SL	Road transport	Granada	2006	16.05	-7%	+19%	17.27	15.47	0.19	2.16	110
115	Austrian Fruits SL	Road transport	Lleida	2009	15.94	-51%	>999%	32.76	28.07	0.08	1.33	151
116	Tudefrigo Sur SL	Road transport	Almería	1991	n.a.	-	-	15.89	12.66	0.02	0.73	142
117	Frialia Logística SA	Logistic Operator	Pontevedra	1986	15.67	+11%	+42%	14.13	12.82	2.88	15.38	45
118	Aza Logistics SL	Logistic Operator	Valencia	2005	15.66	-0%	+145%	15.71	9.21	-0.49	2.81	167
119	Transportes Las Maravillas SA	Road transport	Murcia	1987	n.a.	-	-	n.a.	15.36	0.42	4.08	116
120	Tudefrigo Logística SL	Logistic Operator	Navarra	1999	15.20	-11%	+73%	17.06	10.64	0.30	2.17	20

REFRIGERATED TRANSPORT COMPANIES IN SPAIN | RANKING BY SALES IN 2023

RK	COMPANY	SPECIALITY	PROVINCE	YEAR OF EST.	SALES 2023	SALES %23/22	SALES %23/19	SALES 2022	SALES 2021	Results	Assets	Workforce
121	Transportes Bolipesk SL	Road transport	Cádiz	2004	15.07	-9%	+25%	16.48	13.57	0.01	2.41	35
122	Transgallego Logistic SL	Road transport	Murcia	1991	15.03	-6%	+30%	15.97	12.26	0.37	2.72	18
123	Transportes Euro Almería 2000 SL	Road transport	Almería	2000	14.66	-5%	+95%	15.36	10.79	0.36	2.34	10
124	Operador Logístico Vitotrans SL	Logistic Operator	Álava	2012	14.57	+28%	+73%	11.35	9.03	0.93	2.76	7
125	Transportes y Logística TLX SL	Road transport	Murcia	2011	14.57	+15%	+118%	12.63	8.23	0.14	2.92	260
126	Frío Guerrero SL	Road transport	Almería	2006	14.27	-3%	+53%	14.65	11.41	0.08	0.37	10
127	Cronofrío SA	Road transport	Girona	2001	14.15	+1%	-3%	14.02	12.94	0.37	2.58	58
128	Estela Trans SL	Road transport	Almería	1994	13.94	+2%	+38%	13.70	11.49	0.39	3.35	89
129	Almacenajes Pogar SL	Road transport	Cuenca	1987	n.a.	-	-	13.41	10.31	0.29	1.05	137
130	José María Navajas SL	Road transport	La Rioja	1998	13.36	-8%	+21%	14.45	11.50	0.36	6.63	110
131	Transgesol SL	Road transport	Almería	2003	13.30	+2%	+1%	13.02	10.41	0.50	7.18	109
132	Nova Frío Logística SL	Road transport	Valencia	2018	13.18	-10%	+22%	14.71	11.06	0.11	0.73	27
133	SC Gallega Cofrivigo	Road transport	Pontevedra	1982	n.a.	-	-	12.68	11.92	0.06	0.58	10
134	Ondatrans Tractores SL	Road transport	Lleida	2014	12.50	+4%	+168%	12.05	8.24	0.05	0.60	98
135	Transportes José Valero Ridao SL	Road transport	Almería	2010	12.43	+31%	+95%	9.49	6.82	0.43	3.68	124
136	Gestión de Manipulación Alimentaria SL	Logistic Operator	Zaragoza	2004	12.37	+15%	+9%	10.78	10.93	1.21	11.07	129
137	Transportes Sindo SL	Road transport	Sevilla	1976	12.31	-14%	-30%	14.36	13.76	0.01	6.30	80
138	Americold Barcelona Santa Perpétua SA	Logistic Operator	Barcelona	2004	12.30	+91%	+225%	6.45	4.29	-1.57	15.00	83
139	Delta Stocks Logistics Global SL	Road transport	Tarragona	2017	12.25	-13%	-20%	14.04	13.22	0.25	2.23	15
140	Kartin SL	Road transport	Pontevedra	1997	12.18	+2%	+15%	11.97	10.28	0.11	1.62	73
141	Satfer España SL	Road transport	Valencia	1983	12.18	+3%	+16%	11.83	10.29	0.56	2.17	72
142	Logística Eurocruz SL	Road transport	Murcia	2005	n.a.	-	-	12.17	12.54	0.43	1.56	79
143	Murgi Cargo SL	Road transport	Almería	1997	n.a.	-	-	n.a.	11.55	0.09	0.67	24
144	Olano Logística del Mar SL	Road transport	Gipuzkoa	2018	11.53	+4%	+23%	11.10	9.85	0.13	0.56	222
145	Rau Load Cargo Sevilla SL	Road transport	Valencia	1996	11.52	-1%	+53%	11.63	9.63	-0.03	0.04	15
146	Olano Valencia SL	Logistic Operator	Valencia	2003	11.44	+44%	+150%	7.96	5.99	1.66	5.89	71
147	Tojeiro Transportes SA	Road transport	Coruña	1977	11.00	-14%	+10%	12.79	10.44	0.77	15.31	41
148	Trans Fruit Logistic Penedés SL	Road transport	Barcelona	2012	10.99	+38%	+49%	7.95	6.36	1.82	3.86	64
149	Vicente Loureda García SL	Road transport	Coruña	1991	10.96	-1%	+13%	11.05	9.59	-0.08	2.60	23
150	Martínez Cobo e Hijos SL	Road transport	Girona	2000	10.93	+2%	+20%	10.77	9.83	0.42	3.24	28
151	Grupo Miguel Ramón SL	Road transport	Tarragona	1986	10.93	-26%	+17%	14.83	12.99	0.91	7.17	78
152	Vicente E Escudero SL	Road transport	Alicante	2002	10.91	-3%	+21%	11.26	9.77	0.48	2.77	73
153	Interbalsa SL	Road transport	Murcia	1993	10.77	-11%	+3%	12.04	10.01	0.65	3.74	97
154	Transports Internacionals R Fuster SL	Road transport	Alicante	2005	10.75	-15%	+7%	12.70	12.00	0.07	1.32	83
155	Gestión de Servicios Logísticos Silla SL	Logistic Operator	Valencia	2008	10.65	+25%	+28%	8.52	6.93	0.07	0.40	6
156	Transportes y Pescados los Alegres SL	Road transport	Alicante	1999	10.62	+15%	+95%	9.22	8.00	1.05	4.78	138
157	Interlogística del Frío SA	Logistic Operator	Barcelona	1958	10.59	+6%	+29%	9.99	8.28	0.53	5.22	59
158	Nafimar SL	Road transport	Murcia	1999	10.57	>999%	>999%	0.49	0.30	2.44	42.60	1
159	Frigoríficos Vacas Martínez SL	Logistic Operator	Ciudad Real	2020	10.51	+39%	-	7.54	0.11	0.15	0.72	8
160	Frigorificos de Galicia SA	Logistic Operator	Pontevedra	1972	10.44	+3%	+9%	10.13	9.22	1.13	9.00	49
161	Cefrusa Servicios Frigorificos SA	Logistic Operator	Barcelona	1967	10.32	-5%	+34%	10.82	10.21	0.33	4.46	106
162	Ascensión García SL	Road transport	Murcia	1998	10.21	+12%	+55%	9.08	6.07	0.55	2.01	47
163	Logística de Cox SL	Road transport	Alicante	2006	10.12	-4%	-4%	10.51	9.85	0.30	1.19	48
164	Trans Miquel Benavent SL	Road transport	Barcelona	2001	9.98	-6%	+5%	10.63	9.21	0.00	0.77	92
165	Frigoríficos del Mercat del Peix SA	Logistic Operator	Barcelona	1990	9.96	+2%	+12%	9.73	8.36	0.99	9.26	88
166	Frío Alcontar SL	Road transport	Almería	2010	9.90	-15%	+180%	11.71	7.71	0.09	0.44	78
167	Frío Cantoria SL	Road transport	Almería	1996	9.79	-4%	+56%	10.18	7.14	0.32	4.79	87
168	Omega Delivery SL	Road transport	Madrid	1998	9.76	-5%	-23%	10.26	9.99	2.58	4.42	7
169	Transleo Sur SL	Road transport	Sevilla	2012	9.67	-18%	+14%	11.73	8.00	0.07	1.53	99
170	Servicios Logísticos del Pla SL	Road transport	Lleida	1996	9.52	-7%	+8%	10.19	8.78	0.39	7.25	92
171	Transaguimu SL	Road transport	Almería	2014	9.50	-5%	+25%	10.03	8.19	0.70	5.72	65
172	Transportes El Mosca Murcia SA	Road transport	Murcia	1986	n.a.	-	-	9.45	5.79	0.56	0.49	116
173	Cargo Nijar SL	Road transport	Almería	2012	n.a.	-	-	9.22	8.07	0.31	1.51	15
174	Lineage Milagro SA	Logistic Operator	Navarra	1987	9.22	-9%	+30%	10.10	10.32	-2.27	10.33	69
175	Betese Gestión de Serv. Almacenajes y Portes SL	Road transport	Barcelona	2000	9.19	+10%	+14%	8.39	7.20	0.16	2.00	18
176	Transportes Cameselle SL	Road transport	Pontevedra	1988	9.12	-4%	+31%	9.50	7.53	0.54	2.40	72
177	Transportes Frigoríficos RP SL	Road transport	Jaén	1997	n.a.	-	-	n.a.	9.06	-0.37	0.10	72
178	Transportes Barceló 2010 SL	Road transport	Baleares	2001	9.06	+2%	+3%	8.85	7.88	0.17	0.97	124
179	Transportes Famadesa SL	Road transport	Málaga	2001	9.02	+5%	+33%	8.61	7.20	0.95	4.75	64
180	Genaro Rodríguez e Hijo SL	Road transport	Huelva	1997	9.00	-13%	+3%	10.30	10.94	-0.08	1.76	48

REFRIGERATED TRANSPORT COMPANIES IN SPAIN | RANKING BY SALES IN 2023

RK	COMPANY	SPECIALITY	PROVINCE	YEAR	SALES					Results	Assets	Workforce
				OF EST.	2023	%23/22	%23/19	2022	2021			
181	Transdonat SA	Road transport	Valencia	1970	8.98	-20%	-	11.28	10.51	-0.91	0.86	83
182	Agencia Transportes Almiramar SL	Road transport	Lleida	1997	8.78	-0%	+46%	8.80	7.97	0.00	0.95	59
183	Fríocargo Herbatra SL	Road transport	Zaragoza	2004	8.77	+2%	+56%	8.58	6.81	0.02	0.21	49
184	Lotemfri SL	Logistic Operator	Zaragoza	2019	8.76	+19%	>999%	7.34	6.01	0.40	0.74	88
185	Fri Olvega SL	Logistic Operator	Soria	2001	8.72	+3%	+38%	8.46	7.93	0.11	10.99	112
186	Amodo Mio Logist Cargo SL	Road transport	Murcia	2018	8.71	-18%	+63%	10.60	8.42	0.11	0.36	19
187	Aupatrans Transporte Internacional SL	Road transport	Granada	2013	8.68	-12%	+48%	9.87	10.20	0.16	1.35	68
188	Transportes Farmaceúticos SA	Road transport	Madrid	1986	8.54	-5%	-5%	8.96	8.76	0.08	1.79	15
189	Transportes Robles Castañón SL	Road transport	León	2003	8.50	+4%	+67%	8.14	6.19	0.16	1.95	68
190	Logística y Paquetería Horeca SL	Road transport	Sevilla	2015	8.45	+3%	+34%	8.17	7.02	0.07	0.42	39
191	Olano Murcia SL	Road transport	Gipuzkoa	1986	8.40	+20%	+12%	6.99	6.68	-0.36	0.79	52
192	Transmado Express 2002 SL	Road transport	Jaén	2002	8.36	-13%	+4%	9.57	7.53	0.42	3.55	91
193	Sauratrans SL	Road transport	Murcia	1995	8.33	-12%	-9%	9.43	8.97	-0.05	1.81	62
194	Logísticas Goyanes SL	Road transport	Lugo	2006	8.26	-2%	-4%	8.46	7.29	0.17	2.85	51
195	Grupo Hnos Terres Montiel SL	Road transport	Murcia	2006	n.a.	-	-	n.a.	8.22	0.13	0.80	33
196	Refrilog SL	Road transport	Baleares	2005	n.a.	-	-	n.a.	8.22	0.49	1.64	49
197	José Hernández Quijada e Hijos SL	Road transport	Murcia	1994	8.16	+6%	+51%	7.72	6.27	0.38	2.73	54
198	Soapa Galicia SL	Road transport	Coruña	1994	8.14	+9%	+62%	7.49	6.09	0.43	1.25	7
199	Transportes Frío Nature SL	Road transport	Almería	2021	8.01	+34%	-	5.99	1.04	0.18	0.71	77
200	Transportes Francisco Bonilla Pozo SL	Road transport	Jaén	1995	8.00	-7%	+32%	8.65	7.15	0.43	1.19	70
201	Caserfri SL	Logistic Operator	Zaragoza	1999	7.96	-7%	-3%	8.55	8.07	0.29	14.78	70
202	Logistica i Serveis del Fred de Ponent SL	Logistic Operator	Lleida	2014	7.92	-4%	+40%	8.22	7.41	1.09	9.33	51
203	Logística Transloyma Huelva SL	Road transport	Huelva	2016	7.89	+17%	+111%	6.73	4.05	0.41	1.17	60
204	Transportes Arrastio SL	Road transport	Gipuzkoa	1999	7.79	-5%	+13%	8.17	6.97	-0.06	2.58	43
205	Truck One SL	Road transport	Madrid	2007	n.a.	-	-	n.a.	7.78	0.22	1.20	49
206	Potel Torres Transportes SL	Road transport	Pontevedra	2006	7.78	-6%	+4%	8.27	8.37	0.57	4.45	32
207	Carnes Erdella SL	Road transport	Bizkaia	1984	7.77	+1%	+29%	7.70	6.44	0.42	3.37	85
208	Tircarhe SL	Road transport	Córdoba	2003	7.72	-14%	+10%	8.99	7.63	0.83	6.23	57
209	Murgi Servicios Logísticos SL	Road transport	Almería	1995	n.a.	-	-	7.67	4.87	0.26	0.77	53
210	Transportes Frigoríficos García Ramiro SL	Road transport	Girona	2008	7.61	-11%	+29%	8.53	6.66	0.08	0.78	48
211	Protea Productos del Mar SA	Logistic Operator	Pontevedra	1997	7.56	-15%	-12%	8.91	9.34	0.64	12.86	26
212	Servi Global Trans 2015 SL	Road transport	Pontevedra	2002	7.53	+12%	+301%	6.75	4.23	0.38	0.92	60
213	Vicente Colomar Blanco SL	Road transport	Valencia	1988	7.41	-4%	+48%	7.75	6.83	0.30	2.77	50
214	Cool Cargo Solutions SL	Road transport	Barcelona	2012	7.39	+1%	+8%	7.28	6.62	0.15	0.46	7
215	Frío Limpio de Aragón SL	Logistic Operator	Zaragoza	2000	7.37	-19%	-12%	9.12	10.46	-0.81	0.01	86
216	Fruport Tarragona SL	Logistic Operator	Tarragona	2008	7.34	-3%	+10%	7.56	7.47	1.01	2.57	40
217	Giltrans Llutxent SL	Road transport	Valencia	2013	n.a.	-	-	7.29	4.65	0.24	1.32	34
218	Transportes Frigoríficos del Segre SL	Road transport	Lleida	2000	7.28	-9%	-13%	7.99	7.66	0.01	0.80	46
219	Transportes Indo SA	Road transport	Gipuzkoa	1983	7.28	-2%	+8%	7.43	6.82	0.32	3.34	55
220	Frigoríficos Tisco I SL	Road transport	Alicante	2001	7.26	+17%	+111%	6.21	4.65	0.02	0.44	76
221	Lofriastur SL	Road transport	Asturias	2013	7.22	-0%	+12%	7.24	6.43	0.01	1.78	57
222	Servicios Logísticos Souto SL	Road transport	Pontevedra	1983	7.21	-9%	+30%	7.91	6.11	0.63	3.08	51
223	Frío Albatana SL	Road transport	Albacete	2004	7.19	+7%	+21%	6.70	6.12	0.35	1.47	51
224	Lineage Murcia SL	Logistic Operator	Murcia	2001	7.18	-3%	+5%	7.40	7.69	1.30	4.03	39
225	Americold Algeciras SL	Logistic Operator	Cádiz	2010	7.09	-4%	+49%	7.40	5.98	-1.06	3.13	31
226	Frigo Vanfer SL	Road transport	Lleida	2010	7.07	-5%	+8%	7.47	7.08	0.09	2.04	17
227	Castillo Logística Avanzada SL	Logistic Operator	Sevilla	2021	7.05	+101%	-	3.50	0	0.34	1.33	39
228	Transportes Frigoríficos Transfrikar SL	Road transport	Murcia	2018	n.a.	-	-	7.04	5.75	0.12	0.84	63
229	Yonatan Pérez Suárez SL	Road transport	Lugo	2013	7.03	-19%	-42%	8.69	8.57	0.03	-1.26	51
230	Transportes Antonio Belzunces SL	Road transport	Almería	1992	n.a.	-	-	n.a.	6.98	0.04	8.81	37
231	Tajotrans SL	Road transport	Toledo	1993	6.97	+4%	+19%	6.72	6.31	0.10	2.59	53
232	Betiko Trans SL	Road transport	Gipuzkoa	1996	6.96	+5%	+3%	6.60	6.88	-0.06	1.59	11
233	Panero Logística SL	Road transport	Asturias	2003	6.96	+17%	+25%	5.96	5.77	-0.04	2.77	55
234	Transportes Francisco Cordero e Hijos SL	Road transport	Huelva	1999	6.94	-15%	+8%	8.15	6.63	0.05	0.24	73
235	Rau Load Cargo Denia SL	Road transport	Valencia	2005	6.93	-20%	-12%	8.66	6.63	0.07	0.14	8
236	Transportes Eugenio Ortiz Novillo SL	Road transport	Ciudad Real	1999	6.89	+2%	-	6.72	5.08	0.43	2.43	66
237	Logística Cerecedo SL	Road transport	León	2011	n.a.	-	-	6.84	5.07	0.02	0.28	45
238	Los Gemelos 2001 SL	Road transport	Murcia	2001	6.80	-6%	+49%	7.25	4.99	0.41	2.31	59
239	Transportes Marcial SL	Road transport	Murcia	2020	6.80	+1%	-	6.72	5.37	0.19	1.08	52
240	Andalfrío Logística SL	Road transport	Sevilla	2018	6.57	+9%	+361%	6.00	3.87	0.11	0.40	47

Transporte XXI
December, 2025

REFRIGERATED TRANSPORT COMPANIES IN SPAIN | RANKING BY SALES IN 2023

RK	COMPANY	SPECIALITY	PROVINCE	YEAR OF EST.	SALES 2023	%23/22	%23/19	2022	2021	Results	Assets	Workforce
241	Teletransporte Aragón SL	Road transport	Zaragoza	1991	6.56	+10%	+24%	5.99	n.a.	0.06	1.97	44
242	Servicios Frigoríficos Caribú SL	Road transport	Badajoz	2014	6.55	-1%	+27%	6.60	4.88	0.20	1.43	52
243	Garcimar Transportes Frigoríficos SL	Road transport	Albacete	2007	n.a.	-	-	6.55	5.88	0.22	1.86	24
244	Arimon Logistics SL	Road transport	Barcelona	2007	6.51	+8%	+45%	6.05	4.72	0.56	1.73	52
245	Pitarch Logística SA	Road transport	Castellón	1984	6.46	-13%	-18%	7.40	6.78	0.13	5.74	53
246	Hermanos Lardín Vivancos SL	Road transport	Murcia	1991	6.45	-23%	+15%	8.39	n.a.	0.02	0.23	35
247	Whitmore West Company SL	Road transport	Zaragoza	2014	6.41	+11%	+99%	5.80	4.57	0.13	0.41	33
248	Hermanos Robledo SL	Road transport	Asturias	1982	6.35	-17%	+41%	7.65	5.08	-0.80	1.34	45
249	Primapharma 2018 SL	Road transport	Girona	2018	6.25	+270%	>999%	1.69	0.23	0.26	0.34	4
250	Arnas Logística SL	Road transport	Madrid	2001	6.25	+13%	+138%	5.52	3.95	0.01	0.32	94
251	Betrex España SA	Road transport	Valencia	1990	6.24	-7%	+4%	6.68	5.92	0.03	0.41	10
252	Transportes Frigoríficos Ramón Villalba SL	Road transport	Barcelona	2002	6.22	-12%	-	7.05	n.a.	0.17	1.16	28
253	Cibelpa Logística SL	Road transport	Alicante	2011	6.22	+5%	+246%	5.94	4.09	0.08	0.53	4
254	Conservas y Frigoríficos del Morrazo SA	Logistic Operator	Pontevedra	1986	6.21	+9%	-2%	5.70	5.99	0.84	7.94	39
255	Transportes Manuel Ares SL	Road transport	Coruña	1999	n.a.	-	-	n.a.	6.19	0.23	4.44	49
256	AT Fríobaza SL	Road transport	Granada	2007	n.a.	-	-	6.18	5.33	0.05	0.88	25
257	Mbcold Logistics SL	Road transport	Barcelona	2015	6.17	+25%	+130%	4.95	3.80	0.28	1.10	32
258	Suditrans SL	Road transport	Murcia	1993	6.16	+1%	+11%	6.10	5.41	0.28	4.96	47
259	Tir Compostela SL	Road transport	Coruña	2015	6.15	+2%	+256%	6.06	3.80	0.03	0.31	27
260	Trío Operadores Logísticos SL	Road transport	Zaragoza	1997	6.12	-11%	+20%	6.90	4.85	0.00	0.25	62
261	Frigonor Coldstore SL	Logistic Operator	Pontevedra	2020	6.09	+260%	-	1.69	0	0.26	8.19	19
262	Consultoría y Gestión Sanitaria SL	Logistic Operator	Ourense	1992	6.06	-0%	+9%	6.08	6.13	-0.26	0.19	131
263	Farmapack Servicio Urgente Operador de Transp. SL	Logistic Operator	Madrid	2011	6.01	+8%	+19%	5.56	4.81	-0.02	0.08	4
264	Aberri Trans SL	Road transport	Navarra	1993	n.a.	-	-	6.00	4.99	0.08	0.10	22
265	Transportes Zaragoza y Merlos SL	Road transport	Murcia	2007	5.97	-17%	+11%	7.23	5.57	0.02	0.37	42
266	Lodilat Logística SL	Logistic Operator	Madrid	2005	5.89	+2%	+50%	5.80	9.41	-0.07	-1.17	35
267	Agencia de Transportes Frígoaljaraque SL	Road transport	Huelva	2008	5.87	-6%	+17%	6.22	5.63	0.63	3.63	32
268	Dispa Cedres SL	Road transport	S.C. Tenerife	1994	5.83	-	-	n.a.	4.13	0.58	3.48	42
269	Transportes Papa Alí SL	Road transport	Murcia	1996	5.83	-16%	-10%	6.93	6.87	0.01	0.32	37
270	Transportes Vila y Fayos SL	Road transport	Albacete	1977	5.82	-4%	-4%	6.06	5.69	0.10	3.03	36
271	Transportes Salvador Martín Bravo e Hijos SL	Road transport	Madrid	2006	5.82	+5%	+46%	5.53	5.38	0.21	2.34	61
272	Logística Gens SL	Road transport	Pontevedra	2012	5.75	-0%	+0%	5.76	5.42	0.07	1.23	30
273	Alcazaba Logística y Servicios SL	Road transport	Almería	2012	5.67	+13%	+56%	5.00	4.26	0.49	2.44	15
274	Frío Huelva SL	Road transport	Huelva	2000	5.56	-7%	+4%	5.99	5.31	0.22	2.04	27
275	Transportes Frigoríficos Macael SL	Road transport	Almería	2000	5.51	+3%	+874%	5.34	4.02	0.40	2.09	42
276	Criado Grupo Logístico SL	Road transport	Zaragoza	2005	5.51	+2%	+1%	5.42	4.31	0.13	0.10	52
277	Hermanos García Camilo SL	Road transport	Almería	1997	5.47	-6%	+9%	5.80	4.96	0.36	2.85	37
278	Lofritrans Noroeste SL	Road transport	Pontevedra	2009	5.46	-8%	+40%	5.93	4.68	0.56	2.76	35
279	Transfarm Lleida SL	Road transport	Lleida	2012	5.46	-6%	+78%	5.80	4.56	0.04	0.27	108
280	Salvesen Logística Canarias SL	Logistic Operator	S.C. Tenerife	2006	5.45	+2%	+18%	5.33	4.53	0.45	0.45	28
281	Transportes Erustes SL	Road transport	Toledo	1987	5.44	-15%	+21%	6.39	5.02	0.02	2.53	36
282	Tránsitos Julián SL	Road transport	Cádiz	2008	5.43	+36%	+72%	4.00	3.28	0.05	0.49	33
283	Transfrygoastur SL	Road transport	Asturias	1999	5.41	+11%	-2%	4.89	4.64	0.09	0.21	31
284	Transnewcat SL	Road transport	Barcelona	2020	5.40	+21%	-	4.47	3.72	0.06	0.36	22
285	Friogardi Cuenca SL	Road transport	Cuenca	2012	5.39	+4%	+49%	5.19	4.70	0.13	1.02	48
286	Servicios Logísticos de Caravaca de la Cruz SL	Road transport	Murcia	2007	5.35	-2%	+11%	5.43	5.80	0.06	0.43	38
287	Logística Nieves SL	Road transport	Málaga	2005	n.a.	-	-	5.35	4.15	0.03	0.12	43
288	Chabas Frío SL	Road transport	Girona	2015	5.34	+1%	+47%	5.31	3.81	0.22	0.81	8
289	Transportes Familia Pico SL	Road transport	Asturias	2014	5.33	-12%	+63%	6.03	4.60	0.02	0.29	33
290	Trafema SL	Road transport	Pontevedra	1987	5.27	-20%	+4%	6.55	5.68	0.15	3.34	25
291	Laytor Trans SL	Road transport	Castellón	2002	5.19	-12%	-3%	5.87	5.02	0.40	3.40	23
292	Transdiana SL	Road transport	Murcia	2004	5.18	-2%	+1%	5.27	4.46	0.06	1.02	8
293	Paneuropa Frigo Services SL	Road transport	Madrid	2015	5.17	+5%	+108%	4.93	2.07	0.36	0.62	3
294	Hijos de Luis Jurado Transportes SL	Road transport	Jaén	2007	5.13	+0%	-15%	5.11	6.03	0.05	0.78	46
295	Ciudad Ejido SL	Road transport	Almería	2021	5.12	-8%	-	5.55	5.09	0.06	0.21	4
296	Logística Orfeón SL	Road transport	Murcia	2018	n.a.	-	-	n.a.	5.11	1.39	1.82	36
297	Transportes Frigoríficos Sandoval SL	Road transport	Asturias	1986	5.11	+12%	+15%	4.57	4.19	0.12	2.10	34
298	García Carrasco SA	Road transport	Murcia	1987	5.09	-1%	-8%	5.12	4.96	0.13	5.03	29
299	Transportes Segura y Guevara SL	Road transport	Almería	1992	5.07	-9%	+1%	5.55	5.14	0.25	4.56	45
300	Mailogist SL	Road transport	Almería	2014	5.04	-3%	-17%	5.21	4.52	0.07	0.69	24


A port and its sales outlets have
never been so united

Transporte XXI
December, 2025

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

SPAIN TO EUROPE TRADE BY ROAD IN HORTICULTURAL PRODUCTS

	2024	%24/23	%24/19	2023	2019	SHARE 2024	2019
Germany	3,660	+9%	-3%	3,362	3,790	26.7%	27.3%
France	3,625	+9%	+2%	3,341	3,538	26.4%	25.5%
Portugal	1,473	+5%	+25%	1,406	1,174	10.7%	8.5%
Netherlands	1,241	+2%	-5%	1,217	1,310	9.0%	9.4%
Italy	980	+4%	-13%	940	1,122	7.1%	8.1%
Poland	651	+10%	-10%	594	726	4.7%	5.2%
Belgium	529	-2%	+0%	540	527	3.9%	3.8%
Czech Republic	246	+9%	+6%	226	232	1.8%	1.7%
Sweden	240	+4%	-18%	231	292	1.7%	2.1%
Austria	164	+14%	-17%	144	197	1.2%	1.4%
Denmark	157	+2%	-20%	154	196	1.1%	1.4%
Rest	764	+18%	-1%	645	770	5.6%	5.5%
TOTAL EU 27	**13,728**	**+7%**	**-1%**	**12,800**	**13,875**		

DENMARK

EXPORTS	2024	%24/23	%24/19
Citrus fruits	40	-3%	-19%
Other	114	+4%	-22%
TOTAL	**153**	**+2%**	**-21%**
IMPORTS	**3**	**-21%**	**+61%**

GERMANY

EXPORTS	2024	%24/23	%24/19
Citrus fruits	926	+5%	-15%
Other fresh vegetables	513	+10%	+14%
Melons, watermelons and papayas	403	+12%	-16%
Cucumbers and gherkins	336	+10%	+20%
Apricots, cherries, plums...	286	+5%	-13%
Other	1,156	+11%	+2%
TOTAL	**3,621**	**+9%**	**-4%**
IMPORTS	**39**	**+10%**	**+21%**

NETHERLANDS

EXPORTS	2024	%24/23	%24/19
Citrus fruits	170	+1%	-29%
Other fresh vegetables	164	+5%	-11%
Melons, watermelons and papayas	101	+11%	-11%
Lettuce, endives, chicory...	68	+3%	-9%
Cabbages, cauliflowers, swedes...	65	+7%	-3%
Other	392	+5%	+1%
TOTAL	**961**	**+5%**	**-10%**

IMPORTS	2024	%24/23	%24/19
Potatoes	82	-10%	+25%
Cooked or frozen vegetables	36	-19%	-0%
Tomatoes	30	+7%	-14%
Onions, garlic, leeks...	29	-13%	+375%
Other	102	-2%	+2%
TOTAL	**279**	**-7%**	**+15%**

IRELAND

EXPORTS	2024	%24/23	%24/19
Citrus fruits	33	+25%	+50%
Other	83	+8%	+15%
TOTAL	**116**	**+12%**	**+23%**
IMPORTS	**0**	**+16%**	**-62%**

BELGIUM

EXPORTS	2024	%24/23	%24/19
Citrus fruits	93	-0%	-15%
Cooked or frozen vegetables	53	+11%	-22%
Other fresh vegetables	42	+9%	+7%
Other	171	-8%	-8%
TOTAL	**359**	**-2%**	**-11%**

IMPORTS	2024	%24/23	%24/19
Cooked or frozen vegetables	52	-25%	+63%
Apples, pears and quinces	29	+15%	+27%
Other	90	+12%	+27%
TOTAL	**170**	**-2%**	**+36%**

FRANCE

EXPORTS	2024	%24/23	%24/19
Citrus fruits	667	-0%	-16%
Other fresh vegetables	334	+8%	-3%
Melons, watermelons and papayas	192	+2%	-31%
Cooked or frozen vegetables	160	+8%	+3%
Lettuce, endives, chicory...	158	+5%	+6%
Other	852	+9%	+1%
TOTAL	**2,364**	**+5%**	**-8%**

IMPORTS	2024	%24/23	%24/19
Potatoes	939	+22%	+57%
Cooked or frozen vegetables	92	-3%	-20%
Apples, pears and quinces	50	-9%	-25%
Dry vine vegetables	50	+28%	+26%
Other	131	-6%	-17%
TOTAL	**1,261**	**+15%**	**+29%**

LUXEMBOURG

	2024	%24/23	%24/19
EXPORTS	**7**	**-37%**	**-5%**
IMPORTS	**14**	**+68%**	**+65%**

PORTUGAL

EXPORTS	2024	%24/23	%24/19
Potatoes	171	+5%	+42%
Bananas	98	-11%	+8%
Other fresh vegetables	93	+2%	+44%
Citrus fruits	79	+8%	+39%
Cooked or frozen vegetables	65	-3%	+32%
Other	479	+17%	+16%
TOTAL	**984**	**+8%**	**+24%**

IMPORTS	2024	%24/23	%24/19
Tomatoes	95	-28%	+39%
Potatoes	64	+21%	+42%
Other fresh vegetables	56	+26%	+108%
Apples, pears and quinces	48	+6%	-2%
Citrus fruits	47	+71%	-0%
Other	179	-6%	+24%
TOTAL	**488**	**-1%**	**+29%**

AUSTRIA

EXPORTS	2024	%24/23	%24/19
Citrus fruits	45	+3%	-34%
Other	116	+23%	-5%
TOTAL	**161**	**+17%**	**-15%**
IMPORTS	**4**	**-39%**	**-46%**

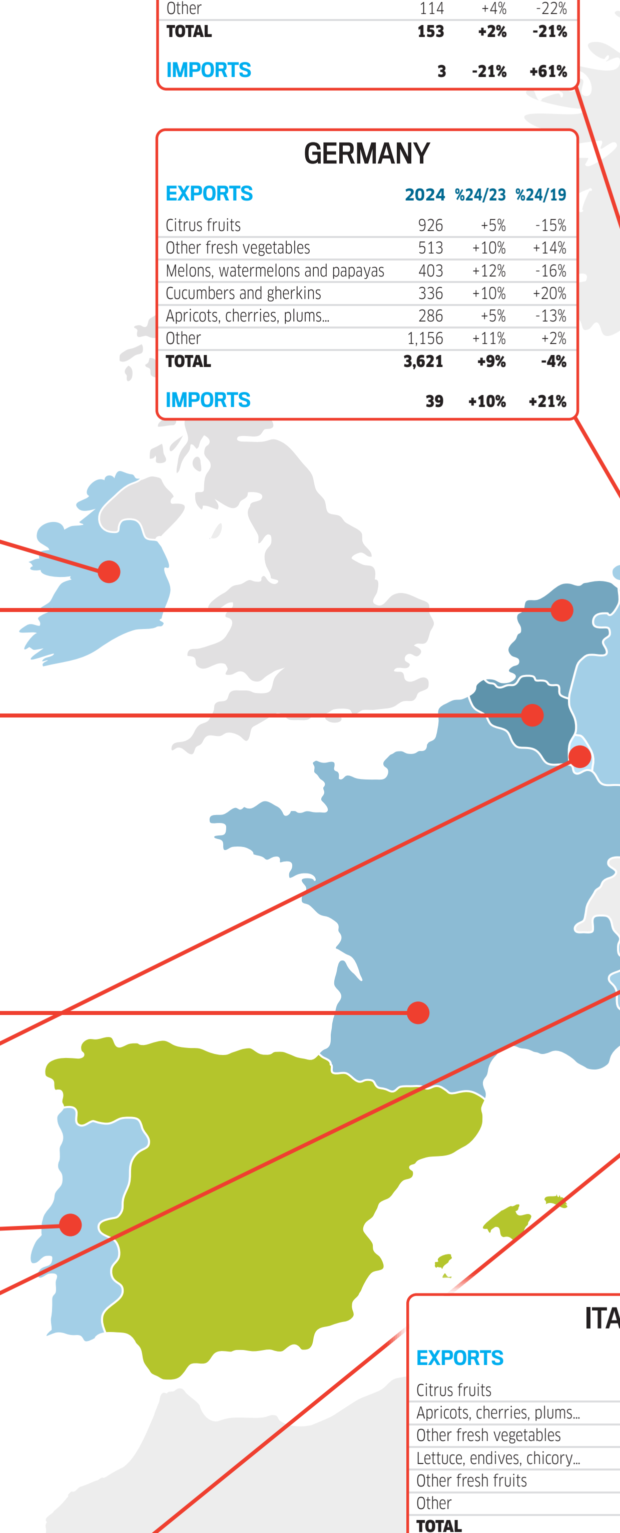
SLOVENIA

	2024	%24/23	%24/19
EXPORTS	**13**	**-18%**	**-57%**
IMPORTS	**0**	**-5%**	**-38%**

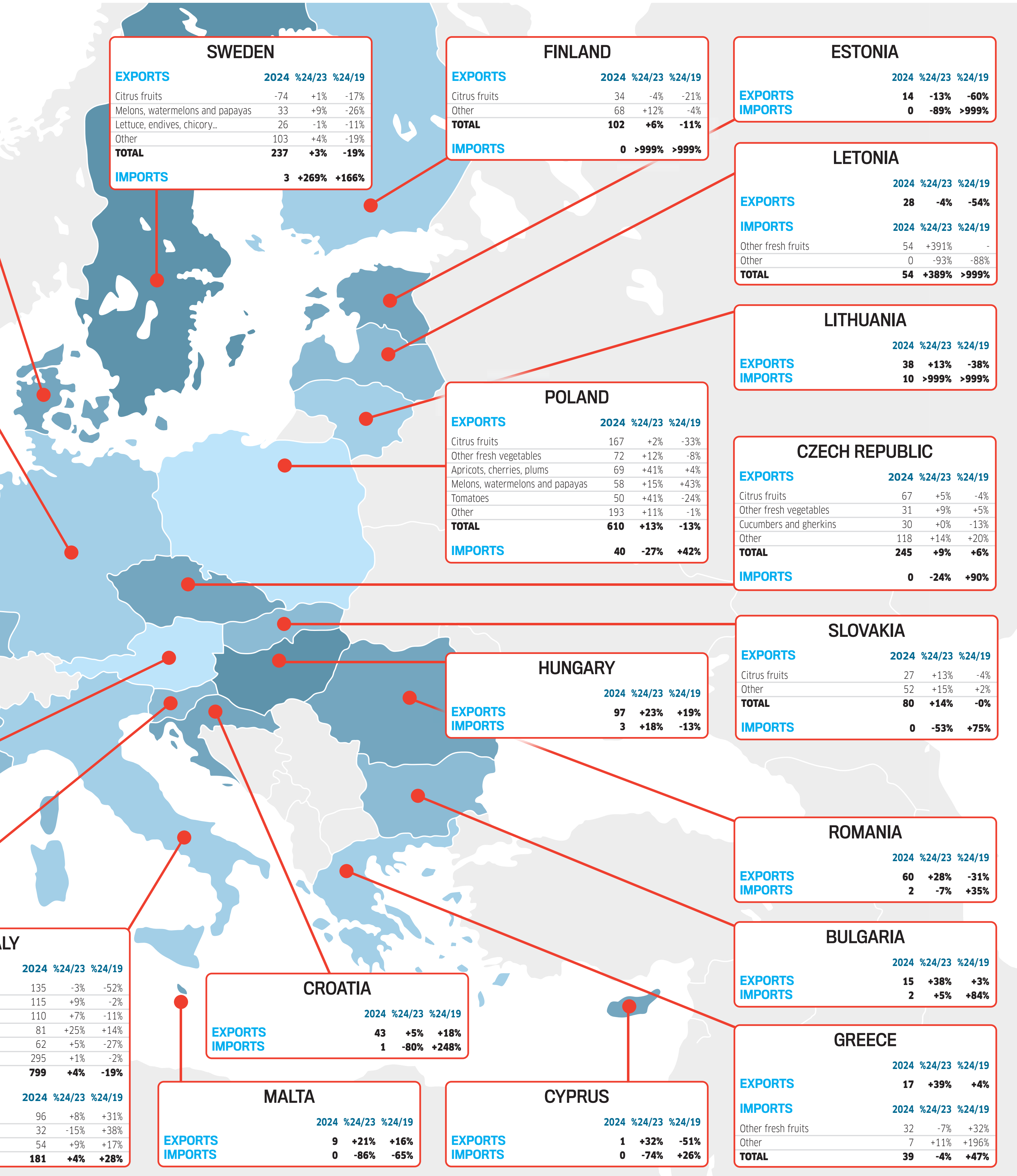
ITA

EXPORTS
Citrus fruits
Apricots, cherries, plums...
Other fresh vegetables
Lettuce, endives, chicory...
Other fresh fruits
Other
TOTAL

IMPORTS
Apples, pears and quinces
Other fresh fruits
Other
TOTAL



(*): United Kingdom left the EU in 2020. Its traffic has been eliminated from the entire history for reasons of homogeneity.



SWEDEN

EXPORTS	2024	%24/23	%24/19
Citrus fruits	-74	+1%	-17%
Melons, watermelons and papayas	33	+9%	-26%
Lettuce, endives, chicory...	26	-1%	-11%
Other	103	+4%	-19%
TOTAL	**237**	**+3%**	**-19%**
IMPORTS	**3**	**+269%**	**+166%**

FINLAND

EXPORTS	2024	%24/23	%24/19
Citrus fruits	34	-4%	-21%
Other	68	+12%	-4%
TOTAL	**102**	**+6%**	**-11%**
IMPORTS	**0**	**>999%**	**>999%**

ESTONIA

	2024	%24/23	%24/19
EXPORTS	**14**	**-13%**	**-60%**
IMPORTS	**0**	**-89%**	**>999%**

LETONIA

	2024	%24/23	%24/19
EXPORTS	**28**	**-4%**	**-54%**

IMPORTS	2024	%24/23	%24/19
Other fresh fruits	54	+391%	-
Other	0	-93%	-88%
TOTAL	**54**	**+389%**	**>999%**

LITHUANIA

	2024	%24/23	%24/19
EXPORTS	**38**	**+13%**	**-38%**
IMPORTS	**10**	**>999%**	**>999%**

POLAND

EXPORTS	2024	%24/23	%24/19
Citrus fruits	167	+2%	-33%
Other fresh vegetables	72	+12%	-8%
Apricots, cherries, plums	69	+41%	+4%
Melons, watermelons and papayas	58	+15%	+43%
Tomatoes	50	+41%	-24%
Other	193	+11%	-1%
TOTAL	**610**	**+13%**	**-13%**
IMPORTS	**40**	**-27%**	**+42%**

CZECH REPUBLIC

EXPORTS	2024	%24/23	%24/19
Citrus fruits	67	+5%	-4%
Other fresh vegetables	31	+9%	+5%
Cucumbers and gherkins	30	+0%	-13%
Other	118	+14%	+20%
TOTAL	**245**	**+9%**	**+6%**
IMPORTS	**0**	**-24%**	**+90%**

SLOVAKIA

EXPORTS	2024	%24/23	%24/19
Citrus fruits	27	+13%	-4%
Other	52	+15%	+2%
TOTAL	**80**	**+14%**	**-0%**
IMPORTS	**0**	**-53%**	**+75%**

HUNGARY

	2024	%24/23	%24/19
EXPORTS	**97**	**+23%**	**+19%**
IMPORTS	**3**	**+18%**	**-13%**

ROMANIA

	2024	%24/23	%24/19
EXPORTS	**60**	**+28%**	**-31%**
IMPORTS	**2**	**-7%**	**+35%**

BULGARIA

	2024	%24/23	%24/19
EXPORTS	**15**	**+38%**	**+3%**
IMPORTS	**2**	**+5%**	**+84%**

...ALY

	2024	%24/23	%24/19
	135	-3%	-52%
	115	+9%	-2%
	110	+7%	-11%
	81	+25%	+14%
	62	+5%	-27%
	295	+1%	-2%
	799	**+4%**	**-19%**

	2024	%24/23	%24/19
	96	+8%	+31%
	32	-15%	+38%
	54	+9%	+17%
	181	**+4%**	**+28%**

CROATIA

	2024	%24/23	%24/19
EXPORTS	**43**	**+5%**	**+18%**
IMPORTS	**1**	**-80%**	**+248%**

MALTA

	2024	%24/23	%24/19
EXPORTS	**9**	**+21%**	**+16%**
IMPORTS	**0**	**-86%**	**-65%**

CYPRUS

	2024	%24/23	%24/19
EXPORTS	**1**	**+32%**	**-51%**
IMPORTS	**0**	**-74%**	**+26%**

GREECE

	2024	%24/23	%24/19
EXPORTS	**17**	**+39%**	**+4%**

IMPORTS	2024	%24/23	%24/19
Other fresh fruits	32	-7%	+32%
Other	7	+11%	+196%
TOTAL	**39**	**-4%**	**+47%**

Spanish imports and exports by road to EU countries. Taric classification headings 07 and 08 (Fruit and vegetables). Traffic in thousands of tonnes. Source: Agencia Tributaria. Compilation: Transporte XXI.

SUPPLY CHAIN | DISTRIBUTION BY MODE OF TRANSPORT

ROAD TRANSPORT EXPANDS ITS DOMINANCE

IT HANDLES 83% OF SPAIN'S FOREIGN TRADE IN FRUIT AND VEGETABLES, A SHARE THAT RISES TO 99% IN TRADE WITH THE EU

Road transport strengthened its role last year as the Spanish agricultural sector's logistics partner of choice. It is the principal mode responsible for getting agri-food products to consumers. This growing prominence is closely linked to the expansion of Spain's foreign trade in fruit and vegetables with Europe (+7 per cent), its main market, representing a 73 per cent share. The statistics released by the Ministry of Industry, Trade and Tourism, processed by Transporte XXI, are striking (see attached graphics).

15.8
MILLION TONNES WERE MOVED BY TRUCK IN 2024

Trucks move 83 per cent of Spain's fruit and vegetable imports and exports —three percentage points more than in 2023. This figure rises to 99 per cent in the context of intra-EU trade.

Hauliers loaded more than 15.8 million tonnes of fruit and vegetables onto their trailers in 2024. Of that total, 87 per cent —some 13.7 million tonnes— went to European union countries. In other words, the equivalent of more than 572,000 trucks.

Together, they would form a convoy stretching from the port of Algeciras to Moscow and back. Or, put another way, traffic of 11,000 heavy vehicles per week.

The next most widely used mode is maritime transport, which holds a 16 per cent share of foreign trade in fruit and vegetables, with a volume of 3 million tonnes in 2024. Within the European Union, however, this percentage shrinks to almost nothing, accounting for just 1 per cent.

Finally, rail and air continue to play only token roles —mere bystanders. To make matters worse, fruit and vegetable imports and exports by rail collapsed by 12 per cent in 2024, with traffic barely reaching 16,000 tonnes. Air transport, by contrast, recorded a 7 per cent increase last year, with more than 68,600 tonnes.

Germany, Main Trading Partner

A closer look at Spain's foreign trade data for fruit and vegetable products reveals the principal destination countries.

Germany leads the ranking once again, with more than 3.6 million tonnes, representing 32 per cent of Spanish sales to the European Union. When imports are added, bilateral trade exceeds 3.66 million tonnes. This figure cements Germany's position as Spain's top trading partner.

Next is France, with nearly 2.4 million tonnes. Including imports, total trade surpasses 3.64 million tonnes —close on Germany's heels, after the latter overtook the French market last year.

GTO is one of Spain's leading refrigerated-transport fleets.

Completing the podium for Spanish fruit and vegetable exports within the European Union is another neighbour, Portugal, which received close to one million tonnes.

These three countries, handling nearly 7 million tonnes between them, account for 62 per cent of Spain's fruit and vegetable exports to the European Union.

On the other hand, the Netherlands, Europe's leading exporter —thanks largely to the role of its ports— occupies fourth place as a destination for Spanish fruit and vegetable products, with 966,000 tonnes, very close to Portugal's figures.

Outside the European single market, the ranking also highlights the significance of the United Kingdom, which remains one of the main trade destinations.

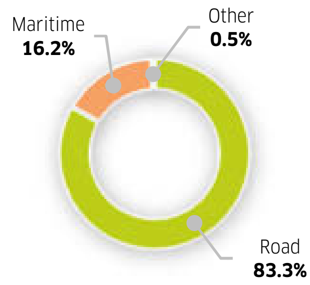
Despite the challenges of Brexit and the new customs controls, Spain managed to place nearly 1.4 million tonnes of fruit and vegetables on the British market last year.

Facilities of El Mosca (Logista) in Molina de Segura (Murcia)

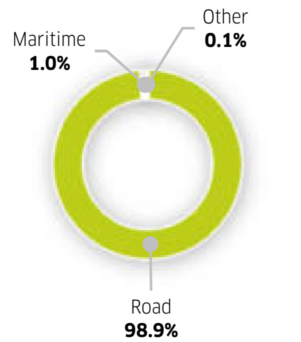
ON WHEELS

Road transport exerts overwhelming dominance. Maritime transport only gains some relevance in global trade.

WORLD



EU - 27



Source: Spanish Secretariat of State for Trade.

Transporte XXI
December, 2025

SUPPLY CHAIN | FREIGHT FORWARDERS

A RESILIENT BUSINESS AMID TURBULENCE

THE SECTOR HAS EXCEEDED, IN SOME CASES, THE EXPECTATIONS OF FREIGHT FORWARDERS DESPITE TRUMP'S TARIFF SWINGS AND THE CONTINUED DIVERSION OF TRAFFIC AROUND THE CAPE OF GOOD HOPE

The reefer business has once again demonstrated its resilience to adversity for freight forwarders. "It has been a positive first half of the year despite being a period plagued with threats such as the United States' tariff war or China's ongoing inspections of our meat companies," sector sources explain. Volumes have not only held up. In fact, "in some cases, they have exceeded our initial expectations, and the outlook remains positive."

Expectations remain favourable for the rest of the year, although uncertainty still characterises trade with the United States (at the close of this edition), not to mention "the irregular fruit seasons we've been experiencing in recent years." With regard to

REEFER WILL CONTINUE TO PLAY A CRUCIAL ROLE

Trump's tariff swings, an analysis of the period from April to July "would suggest that the tariff threat may have triggered a degree of panic." This situation "has led to increases in certain cargo flows solely to anticipate the end of the tariff truce. Some U.S. importers have chosen to stock up on frozen goods."

The reefer segment remains in good health despite the handicaps it has been dragging for nearly two years, subjecting freight forwarders to a double dose of stress: "The major global disruption currently affecting maritime trade, caused by the diversion of vessels to avoid the Red Sea, is an especially complicated situation for reefer cargo." "When we talk about sailing around the Cape of Good Hope instead of through Suez, we are talking about longer transit times that directly affect perishable goods."

At present, there are products—mainly fruit—that "can no longer be exported to destinations in the Middle East and Far East because of the increase in transit times," sources warn.

The diversion of vessels via the Cape of Good Hope results in longer delivery times, but that is only one part of the problem: "What the increase in transit times has brought us, above all, is greater uncertainty and a higher risk that any external factor may generate setbacks." And uncertainty and insecurity "tend to be the worst enemies of trade." "We operate in a climate of uncertainty that does nothing to promote our exports to certain destinations," they add.

As for the future of the business, "there is no doubt that the agri-food industry is a fundamental pillar of Spanish exports." For this reason, "reefer cargo will always play a key role and will remain attractive for operators offering quality service backed by the technical expertise required for this type of goods."

Positive first half despite the handicaps.

In the short term—"we could say until 2026"—the outlook is more subdued. "We do not foresee a boom in the market," one freight forwarder explains. And it will be difficult "to see major increases in general reefer-load volumes from Spain" for as long as traffic continues to be diverted around the Cape of Good Hope.

Therefore, the continued expansion of activity "will depend heavily on external factors such as the climate or geopolitical conditions, which currently limit our export capacity." That said, "this does not rule out long-term growth."

Concerning the impact of new shipping alliances on these flows, "as with almost any change, some effects are positive and others negative." Some of the new alliances "aim for greater reliability in vessel schedules, which should be positive for reefer cargo." The downside, however, is that "we have seen major cancellations in certain direct calls, particularly affecting the port of Barcelona." Nevertheless, the new alliances, overall, "provide good connectivity to Spanish ports, so, in general terms, there have been no major disruptions."

Adapting to the current climatic reality is one of the challenges.

The sector is detecting growing interest from shipping lines in reefer cargo. "The purchase of new reefer units, as well as the installation of tracking devices, are two of the recent developments that demonstrate the growing worldwide interest from the maritime industry," they argue.

On the other hand, "we are seeing that the emissions regulations (ETS) are forcing some services to increase their transit times in search of greater fuel-efficiency."

Sector representatives point to four main challenges: the continuation or end of the vessel diversions around the Cape of Good Hope; the ability to adapt to today's climatic reality, which has put our crops under severe strain in recent years; the increasing concentration of the shipping and freight-forwarding industries into a smaller number of players; and the looming global trade war.

THE NEW ALLIANCES DO NOT AFFECT REEFER TRAFFIC

On the first point, "being unable to sail through the Red Sea will continue to hamper volume recovery, insofar as we will remain unable to export certain products to some countries." As for the lack of rainfall, it "directly threatens the productivity of our agri-food industry, and we've already seen poor harvests in recent years due to this problem."

With regard to consolidation, as in other industries, "we face a future in which it seems that larger shipping lines and freight forwarders will be the ones to prevail. This could imply a concentration of supply and perhaps greater pricing power." Finally, "the looming trade war (at the close of this edition) poses a major challenge, exacerbated by the constant swings in decisions taken by the Trump Administration."

Transporte XXI
December, 2025

SUPPLY CHAIN | LOGISTIC OPERATORS

CLOSED DOMAIN

IN TEMPERATURE-CONTROLLED LOGISTICS—WHERE INSOURCING AND OUTSOURCING COEXIST—THE PLAYING FIELD BELONGS EXCLUSIVELY TO TRUE SPECIALISTS

One of the logistics segments where the work of an operator can make the greatest difference is temperature-controlled logistics. Shippers have only two options when managing their refrigerated processes —which involve significantly higher costs than conventional logistics or dry products: internalising operations or outsourcing them to genuine specialists.

Cold-chain logistics requires major investment, both in complex facilities and in equipment designed to cope with strict temperature requirements, as well as in cutting-edge technologies. Investment in cold-chain platforms ranges from two to three times higher than in ambient-temperature logistics facilities, according to experts. In this context, logistics centres dedicated to managing food and pharmaceutical products continue to grow and evolve.

One of the most active players in recent months in this field is Ontime, which is developing its own temperature-controlled network. The operator recently launched a new logistics platform in Noblejas (Province of Toledo), offering 51,000 square metres of storage space, of which 25,000 square metres are dedicated to positive and negative cold.

The Noblejas platform becomes "the heart" of Ontime's cold-chain activity, with a first development phase planned through 2027, incorporating new facilities in Valencia, Zaragoza, Antequera (Málaga) and Barcelona. This first phase will later be expanded with new nodes in other parts of the country.

The Valencia platform is already operational and offers 25,000 square metres of storage, including 5,000 square metres of cold. The Zaragoza facility will open this year with 10,000 square metres, 3,000 of them cold storage. Meanwhile, the Antequera platform will feature 35,000 square metres —20,000 dedicated to controlled temperature— and in Barcelona Ontime is currently searching for a piece of land to build a warehouse with another 20,000 square metres of cold storage.

The Noblejas logistics platform, designed for FMCG and fresh products, has four bi-temperature chambers ranging from –25°C to +8°C, plus two positive-cold chambers ranging from +2°C to +8°C. Another standout feature is its refrigeration system, based on a mixed cascade-cooler model. In addition, the facility has been designed according to BREEAM sustainability standards.

ID Logistics manages logistics for Alcampo's platform in Illescas (Toledo), partly dedicated to cold storage

TRANSPORTE XXI

TRANSPORTE XXI

The Noblejas warehouse features two positive-cold chambers and four bi-temperature chambers.

Macroplatform

ID Logistics is responsible for operating the new macro-logistics platform of Alcampo in Illescas (Toledo), which covers 98,000 square metres and represents a 25 million investment by the retail group. The platform consolidates the activity previously carried out across two logistics centres in Madrid: Valdemoro (32,000 square metres) and Alcalá de Henares (20,000 square metres).

The macroplatform will handle a range of more than 47,500 products across all temperature categories and is expected to process over 100 million boxes per year —more than 330,000 per day. The facilities offer 65,750 square metres for dry food, household and personal-care products (PGC), 14,600 square metres for refrigerated goods, 8,000 square metres for fruit and vegetables, 2,300 square metres for fish and 3,000 square metres for frozen products. The facility will manage over 10,000 chilled SKUs, with more than 15 million boxes expected to move annually through the refrigerated area.

The installation features a clear height of 11.7 metres in the PGC area and 4.5 metres in the cold area. It is equipped with 228 loading bays, 90 of them dedicated to refrigerated operations. During the inauguration ceremony, the managing director of ID Logistics Iberia, Jérome Jacek, highlighted “the 13-year relationship we have maintained with Alcampo in Spain, which has become a strategic customer for our company.”

Meanwhile, DHL Supply Chain is one of the main logistics operators for the agri-food industry, with a strong presence in the fruit-and-vegetable sector, which generates nearly 50 per cent of the company’s transport activity in Spain. In line with this, the operator has expanded its logistics services for the sector to include Morocco, which —together with Spain and Portugal— forms a key triad for supplying the EU and the UK.

Handling more than 1.5 million pallets annually from 700 collection points in Spain, France and Germany, DHL Supply Chain operates a network that includes six cross-docking platforms and direct pick-up and delivery services, ensuring service levels of 12–24 hours for domestic shipments and 12–72 hours for international ones.

The operator also has its ‘Control Tower’ located in Valencia, specialising in this field. It acts as the central hub for shipments to consolidation centres across the Iberian Peninsula and Europe, improving operational visibility, optimising routes, reducing empty kilometres and maximising load capacity.

HAVI SKIP STEPS FOR ITS NEW COLD STORAGE FACILITY IN MADRID

Projects

Logifrío, a specialist in cold-chain logistics with operations in Spain and Portugal, has recently leased new refrigerated facilities in the Casablanca industrial estate in Torrejón de Ardoz (Madrid). The company has rented two modules totalling 10,467 square metres of storage space, equipped for both positive and negative cold.

HAVI, whose flagship customer is the multinational McDonald’s, continues to advance its project for a new temperature-controlled distribution centre in San Fernando de Henares (Madrid). The facility, now under construction, is expected to be operational before the end of the year.

73,000

M2 OF COLD STORAGE TO BE ADDED BY ONTIME IN ITS FIRST DEVELOPMENT PHASE THROUGH 2027

The new HAVI platform, which will replace the operator’s two existing facilities in the area, occupies a 57,000-square-metre plot. The logistics warehouse will cover 30,000 square metres, including 7,000 square metres of negative cold and another 7,000 of positive cold.

Parcel companies are also turning their attention to refrigerated goods. Seur will include a dedicated cold-storage area in its future central hub in Getafe (Madrid). The turnkey project, developed by Goodman, is scheduled to come into operation in late summer 2026. The Getafe Terminal Logistics Centre will sit on a 100,000-square-metre plot, with a 64,000-square-metre platform.

The warehouse, designed across two levels, will combine long-haul or cross-docking flows with last-mile distribution, plus a dedicated area for chilled food products. The new automated hub will integrate operations from Seur’s current Getafe distribution centre. The facility will include a 6,000-square-metre cold chamber and 200 loading bays.

Sustainability

Another major specialist in the sector, Stef, continues to make progress in sustainability. The operator recently launched two hydrogen projects with Toyota Material Handling Europe, a supplier of hydrogen fuel-cell handling equipment, and Plug Power, a provider of integrated green-hydrogen solutions.

ID LOGISTICS HAS BEEN WORKING WITH ALCAMPO FOR 13 YEARS

The projects are located in Athis-Mons (France) and Torrejón de Ardoz (Spain). In Spain’s case, the hydrogen is produced on-site via an electrolyser, a device that uses electricity to split water into hydrogen and oxygen. The electricity required to power the electrolyser is generated by the photovoltaic plant installed on the warehouse roof, allowing the use of internally produced green hydrogen.

Cold-chain logistics is also expanding rapidly to serve the pharmaceutical sector, one of the most dynamic in the economy. Farmavenix, the logistics operator of Cofares, recently completed an expansion of its cold-storage capacity, resulting in a GDP-compliant network (Good Distribution Practice for medicines) with space for more than 60,000 pallets, cold capacity between +2°C and +8°C exceeding 4,000 slots, and an enlarged frozen-product area.

Farmavenix operates half a dozen logistics centres across Spain and Portugal, with its Marchamalo (Guadalajara) platform standing out. The operator provides full-service logistics, ranging from direct and reverse logistics to more specialised services such as hospital logistics, temperature-controlled product management, vaccine handling, clinical-trial logistics, co-packing and secondary packaging operations, and promotional-material management, among others.

Transporte XXI
December, 2025

SUPPLY CHAIN | COLD STORAGE

A SHAKE-UP IN THE WORLD'S COLD-STORAGE ELITE

THE 'TOP 25' EDGES TOWARD DOUBLE-DIGIT GROWTH WITH NUMEROUS CHANGES

Members of the Global Cold Chain Alliance (GCCA) own or operate a total of 231 million cubic metres —10 per cent more than the previous year— according to data published last April.

The world's 25 largest companies now operate 207 million cubic metres, a 9.5 per cent increase compared with the previous year, driven by mergers and acquisitions as well as the completion of numerous ongoing projects.

"Even with higher capital costs, industry growth across all regions in 2024 exceeded that of the previous two years," said Adam Thocher, Senior Vice President of Global Programs and Insights at GCCA, an organisation comprising more than 1,500 temperature-controlled facilities across 92 countries.

In his view, "although the overall pace of acquisitive growth appeared to slow, capacity continued to expand among the world's largest cold-chain operations. Investments in expansion projects and new-build facilities across all regions show that both traditional operators and new market entrants remain optimistic about future demand."

The 'Top 25' has undergone numerous changes in 2024 from the third position downward. This transformation in the cold-storage industry is reflected in around fifteen upward and downward movements among its members, as well as the entry of five new emerging operators.

10
POINTS
THE INCREASE IN GCCA CAPACITY IN 2024

Lineage retains its global leadership with more than 84.4 million cubic metres. The U.S. giant continues to pursue an ongoing expansion policy, particularly in North America, where it plans to allocate around USD 1 billion over the coming years for acquisitions and new projects.

Accordingly, Lineage will acquire four existing cold-storage warehouses and other related assets from Tyson Foods for USD 247 million. These facilities amount to nearly 1.4 million cubic metres with 160,000 pallet positions and are located in Pottsville (Pennsylvania), Olathe (Kansas), Rochelle (Illinois) and Tolleson (Arizona).

Lineage also plans to invest more than USD 740 million in the construction of two fully automated cold-storage warehouses, adding over 2.2 million cubic metres and almost 260,000 pallet positions. This year, the company announced the acquisition of three warehouses from Bellingham Cold Storage, totalling approximately 24 million cubic feet and 85,000 pallet positions, located on the west coast of Washington State.

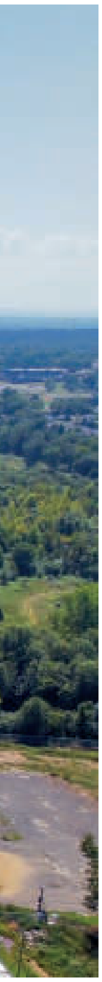
Americold has around 41 million cubic metres of capacity.

Among Lineage's developments last year are the acquisition in Kansas of the ColdPoint facilities, which contain 62,000 pallet positions, and the opening of its new fully automated cold-storage warehouse in Hazle Township, Pennsylvania, with capacity for 85,000 pallet positions.

In Canada, Lineage has strengthened its position with the purchase of two cold-storage warehouses in Sainte-Brigide-d'Iberville, Quebec, as well as another cold-storage facility in Laval, also in Quebec.

Americold maintains second place globally, with assets totalling around 41 million cubic metres of capacity. The U.S. operator announced this year the start of an investment of between USD 75 and 80 mi-

NEWCOLD HAS CLIMBED TO THIRD PLACE IN THE 'TOP 25'



llion for the construction of a facility in Port Saint John, New Brunswick, Canada, which will provide approximately 22,000 pallet positions. It has also begun expanding its Halwyn facilities in Hornby, Christchurch (New Zealand), with an investment of USD 34 million.

NewCold Coöperatief, with around 13 million cubic metres, has climbed to third place —previously held by United States Cold Storage. The Dutch operator is consolidating its presence in the United States with investment plans exceeding USD 275 million for a state-of-the-art automated cold-storage facility in Hagerstown, Maryland. In Australia, NewCold is developing a new facility in Sydney, scheduled to open in 2026 with capacity for 100,000 pallets.

Behind Nichirei Logistics Group, which remains in fifth place, Constellation Cold Logistics, headquartered in Luxembourg,has risen one position to sixth place, accumulating 5.4 million cubic metres of assets and surpassing Emergent Cold Latin America.

Among the new entrants to the ‘Top 25’, the Dutch company Cube Cold Europe stands out, debuting in 11th place with warehouses exceeding three million cubic metres of capacity.

Image of one of Lineage's facilities, the company leading the ranking.

In addition, four U.S. operators have entered the global ranking with developments focused on their home market. Agile Cold Storage, backed by investment fund Aimpera and Continental Grain Company (CGC), has secured 16th place with assets of 2.2 million cubic metres.

Meanwhile, Cold-Link Logistics has entered directly at 19th place with 1.3 million cubic metres. RealCold, backed by real-estate investment manager Related Fund Management (RFM), has taken 21st place. Lastly, Artic Cold closes out the global ‘Top 25’.

FIVE NEW OPERATORS

Cube Cold Europe, Agile Cold Storage, Cold-Link Logistics, RealCold and Artic Cold entered the ‘Top 25’ last year.

RK	COMPANY	CAPACITY
1	Lineage	84,412
2	Americold Logistics	40,917
3	NewCold Cooperatief	12,985
4	United States Cold Storage	11,880
5	Nichirei Logistics Group	6,635
6	Constellation Cold Logistics	5,438
7	Emergent Cold Latin American	5,070
8	FreedzPark Logistics	4,011
9	Frialsa Frigorificos	3,965
10	Interstate Warehousing	3,740
11	Cube Cold Europe NL	3,017
12	SuperFrio Logistica Frigorificada	2,914
13	Vertical Cold Storage	2,758
14	Magnavale	2,489
15	Conestoga Cold Storage	2,469
16	Agile Cold Storage	2,210
17	Arcadia Cold Storage	2,132
18	Congebec	1,863
19	Cold-Link Logistics	1,761
20	Comfrio Inteligencia	1,568
21	RealCold	1,342
22	Nor-Am Cold Storage	1,282
23	Core X Partners	1,228
24	Friozem Logistica	1,154
25	Arctic Cold	1,103

Figures in thousand m3. Source: GCCA.

SUPPLY CHAIN | COLD STORAGE

EUROPE RAMPS UP CAPACITY

THE LEADING OPERATORS REINFORCED THEIR ASSETS AFTER INCREASING COLD-STORAGE CAPACITY BY 23% LAST YEAR

The European cold-storage market regained momentum in 2024 after showing signs of stagnation during the previous year. The ten largest operators added 7.5 million cubic metres, bringing their total to 40.6 million cubic metres, a 23 per cent year-on-year increase.

Lineage Logistics continues to exert absolute dominance in the European market, with assets totalling 18.2 million cubic metres. The U.S. giant, which operates more than 60 facilities across the continent, has begun expansion works at its fully automated cold-storage warehouse in Bergen op Zoom, Netherlands. The site, which serves frozen-potato multinational Lamb Weston, will increase its capacity by 40 per cent, surpassing 250,000 pallet positions.

Lineage also completed this year the expansion of its cold-storage complex in Vejle, Denmark, adding 6,000 square metres and lifting total capacity to 93,500 pallet positions. In addition, Lineage announced in 2025 the acquisition of Permanor. This Norwegian company operates facilities in Haugesund and Brumunddal with more than 10,000 square metres and capacity for 24,500 pallet positions.

NewCold, meanwhile, has continued its climb to secure second place in the European top 10, with assets nearing six million cubic metres. Among its ongoing developments, the company has launched the Corby 3 project in the United Kingdom, adding more than 33,000 pallet positions and taking capacity across its three sites to over 185,000 units.

NewCold

The Dutch operator is maintaining its 112-million investment in facilities located in Warsaw (Nowy Modlin). With capacity for 94,600 pallet positions, the new Polish site will bring NewCold's total footprint in the country to 207,200 positions.

The company has also begun developing a cold-storage facility in Ferentino, Italy, requiring an investment of 70 million. The complex —scheduled to come online next year— will serve frozen-dessert manufacturer Froneri. Meanwhile, the operator has activated its new facilities in Dinteloord, Netherlands, offering 134,000 pallet positions and providing services to multinational Lamb Weston.

7.5

MILLION M3
ADDED BY THE EUROPEAN TOP 10 IN 2024

Constellation Cold Logistics has slipped to third place in the European top 10, despite adding more than one million cubic metres to its continental capacity over the past year, bringing its total to 5.4 million cubic metres. Among its ongoing projects, the company is expanding its Estate Road 2 site in Grimsby, United Kingdom. Once operational, it will add around 37,000 frozen-storage pallet spaces, increasing the facility's capacity to 52,000 pallet positions.

DOUBLE-DIGIT GROWTH

The European market bounced back last year, rising 23% after a flat performance in the previous period..

RK	COMPANY	CAPACITY
1	Lineage	18,207
2	NewCold Coöperatief	5,972
3	Constellation Cold Logistics	5,438
4	Americold Logistics	3,247
5	Cube Cold Europe NL	3,017
6	Magnavale	2,489
7	Nichirei	2,305
8	Frigolanda Cold Logistics Group	368
9	Groupe Conhexa	327
10	Chlodnia Gdansk	98

Figures in thousands of m3. Source: GCCA.

Constellation announced at the end of last year the acquisition of Irish operator CGI Coldstores, with facilities in Dublin and Cork offering 40,000 pallet positions. The operator —led by CEO Carlos Rodríguez— is also preparing an expansion in Aarhus, Denmark, where it plans to add 52,000 pallet positions by early 2027.

The U.S. operator Americold Logistics has also dropped one position in 2024, landing in fourth place in the European ranking with assets of 3.2 million cubic metres.

By contrast, Cube Cold Europe —established in 2022 in Rotterdam with backing from American infrastructure inves-

Cube Cold Europe has entered the Spanish market after acquiring Alfrisan, Grupo Frimercat and Alguazas Frío.

tor I Squared Capital— has surged into fifth place in the continental top 10. The Dutch newcomer is undergoing rapid expansion, both organically and through acquisitions, enabling it to manage more than twenty facilities exceeding three million cubic metres of cold capacity.

The company entered Spain in 2025 with the acquisitions of Grupo Frimercat, Almacenes Frigoríficos San Isidro (Alfrisan) and Alguazas Frío. Together, these companies operate facilities in Catalonia, Madrid, Murcia and Alicante, totalling more than 76,000 pallet positions.

Cube Cold Europe also acquired Belgian companies Sivafrost —which manages 29,000 pallet positions— and Herve Transport & Coldstore.

In Italy, its subsidiaries Frigocaserta and Fridocks completed expansions in 2024 that added more than 22,000 pallet positions to facilities that already exceeded 100,000 pallet spaces.

3

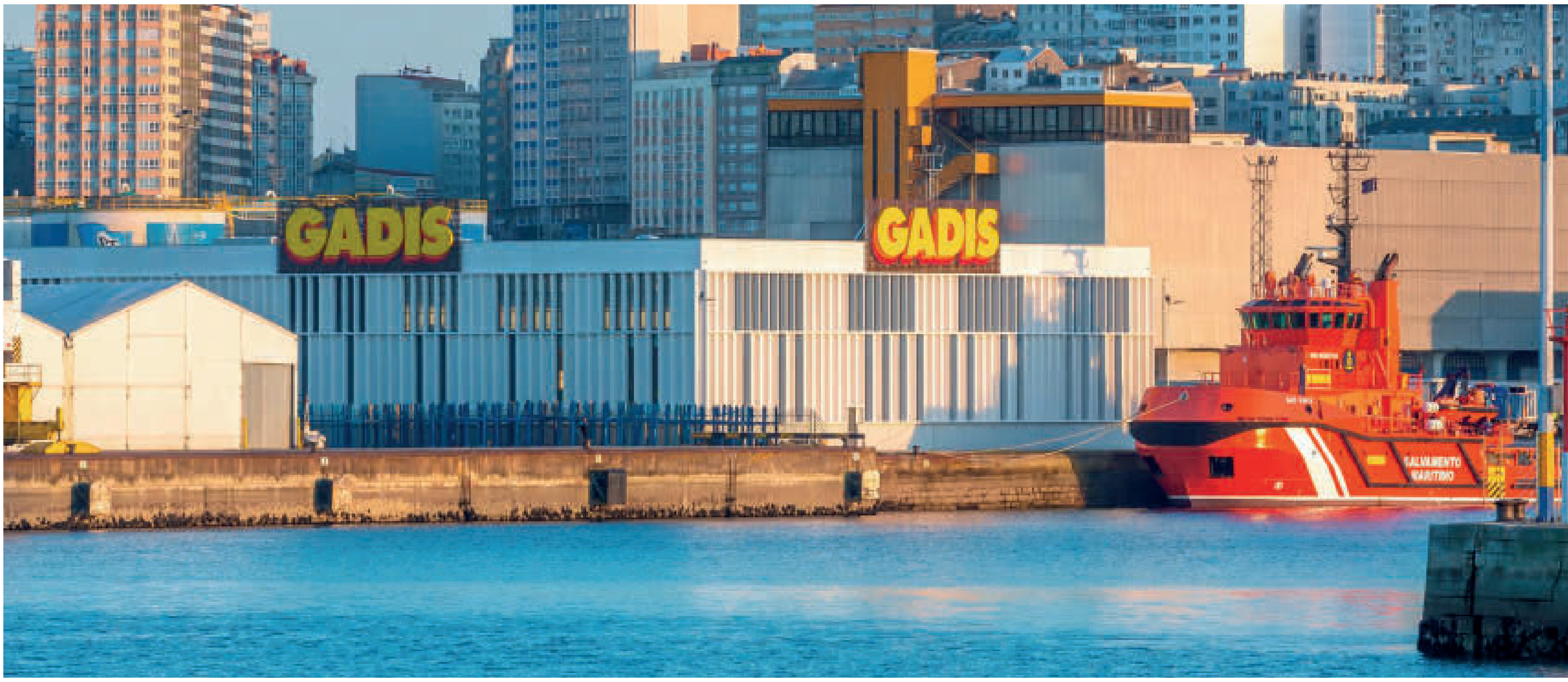
MILLION M3
MANAGED BY CUBE COLD EUROPE, FOUNDED IN 2022

Earlier acquisitions by Cube Cold Europe include Belgian operator Northfreeze, with plants in Evergem, Rieme, Bruges and Westerlo offering over 60,000 pallet positions. The company also took control of British operators R Harding & Sons —with a temperature-controlled warehouse capable of storing 17,000 pallets— and Pulleyn Transport, with another centre offering 5,800 pallet positions.

Magnavale, ranked sixth with 2.5 million cubic metres, opened its Easton facility last year near Grantham, Lincolnshire, with capacity for 101,000 frozen-storage pallets. During the same period, the operator advanced its Chesterfield development —also in the UK— adding 25,000 pallet positions and increasing the site's total capacity to 69,000.

Nichirei moves to seventh place in the European top 10 with more than 2.3 million cubic metres.

Finally, Frigolanda, Groupe Conhexa and Chlodnia Gdansk occupy the last three positions in the ranking —far behind the Japanese operator— with no changes to their storage capacities.



Gadisa's logistics platform in the port of A Coruña.

SUPPLY CHAIN | COLD STORAGE

MAJOR RETAILERS ADD CAPACITY

DIA, LIDL, SEMARK, CONSUM AND MAKRO LEAD A WAVE OF STRATEGIC LOGISTICS INVESTMENTS

"Our sector was always in constant motion, and it still is. This year we have seen a steady stream of news about mergers, acquisitions and the construction of new platforms," says Beatriz Valencia, president of the Asociación Española de Explotaciones Frigoríficas, Logística y Distribución de España (Aldefe).

The food-retail industry has positioned itself as one of the main drivers behind the development of new cold-storage facilities for the Iberian market.

Dia has opened a new logistics centre in Dos Hermanas (Province of Seville), covering 53,000 square metres following a total investment of 50 million. The controlled-temperature chambers —ranging from –21°C to +12°C depending on product needs— occupy 24,000 square metres.

In addition, Dia is building a logistics platform in the Villadangos industrial estate (Province of León), scheduled for completion in the first quarter of 2026, with a 42-million investment. The complex spans 64,000 square metres, with a projected 24,000-square-metre area allocated to controlled-temperature zones for frozen, chilled and fruit-and-vegetable products.

Lidl, for its part, is allocating 140 million to its new logistics platform in Martorell (Province of Barcelona), set on a plot of more than 126,000 square metres in the Xàmenes industrial sector. The building, with 46,000 square metres of floorspace and equipped with 144 loading bays, will open this year, dedicating a significant portion to temperature-controlled storage. Lidl also has a project under way to build another logistics platform on a 158,000-square-metre plot in the León municipality of Villadangos del Páramo.

BEATRIZ VALENCIA
President of Aldefe

"THE SECTOR IS MOVING WITH MERGERS AND MORE PLATFORMS"

Cantabrian retail group Semark, which operates the Lupa supermarket chain, is focused on developing a logistics platform on a 93,000-square-metre plot in the Magaz de Pisuerga business park (Province of Palencia). The facility, with a built area of 51,000 square metres, will dedicate more than 18,000 square metres to temperature-controlled operations.

Semark has also added a further 4,000 square metres of refrigerated space to its main logistics platform located in the Marina-Medio Cudeyo industrial estate in Orejo (Cantabria). The expansion is in addition to the 17,000 square metres of temperature-controlled space already available at the logistics centre, opened in 2019 with a total built area of around 43,000 square metres.

Consum is also strengthening its storage assets. In Barcelona's Zona Franca, the Valencian retail group is building a 2,700-square-metre refrigerated warehouse, along with an auxiliary warehouse and building of nearly 11,500 square metres, which will include a state-of-the-art automated silo. Consum's logistics development plan in Catalonia is completed with a project for a new 100,000 square-metre platform in Montcada i Reixac (Province of Barcelona).

CONSUM IS DEVELOPING MULTIPLE PROJECTS WITHIN ITS LOGISTICS NETWORK

In addition, Consum has purchased a 163,000-square-metre plot in the Antequera Logistics Centre (Pro-

vince of Málaga) from Baraka Logistics to build another platform, with a total projected investment of 150 million. In late 2024, Consum also acquired a 150,000-square-metre urbanised plot in the Noblejas logistics technology park (Province of Toledo) for the construction of a logistics platform. Last year, the company completed a 50-million investment in its logistics centre in Las Torres de Cotillas (Murcia).

Multi-Temperature Facility

Makro has launched a multi-temperature logistics platform in the Itzaga industrial estate in Galdakao (Basque Country), covering nearly 12,500 square metres. This development forms part of the company's strategy to boost its distribution and online-sales services for the hospitality sector, with which it aims to reach annual sales of around 3 billion by 2030.

Gallega de Distribuidores de Alimentación (Gadisa) has opened a logistics platform in the port of A Coruña for its subsidiary Pescarmar, responsible for selecting, purchasing and managing fish and seafood, following an investment of nearly 6 million.

ALDEFE EARNS THE AEI SEAL

The frozen-food storage and distribution industry continues to undergo transformation as it faces challenges such as rising energy costs, regulatory pressure, sustainability requirements and demand volatility, all of which are redefining business models and the operational processes that support them.

To accelerate change, Aldefe —representing more than 80 per cent of the sector— obtained in July the seal of Agrupación Empresarial Innovadora (AEI). The Aldefe association, representing more than 50 companies with over seven million cubic metres of public cold-storage capacity, has been officially registered in the Ministry of Industry and Tourism's registry of innovative business groups.

This recognition allows Aldefe-member companies to access public funding lines that can cover between 15 per cent and 65 per cent of the cost of business-development projects based on new technologies or R&D&I, depending on their nature and the profiles of the participating companies.


Dia facilities.

Among the benefits for companies are serving as a platform for contact with other businesses and cluster stakeholders for knowledge-sharing and business opportunities; developing innovation projects; and accessing projects of common interest at the national, European and international levels.

At the same time, it helps identify market trends and needs, facilitates services and support that enhance competitiveness through innovation and technological development, and promotes the internationalisation of member companies. Alongside this recognition, Aldefe also launched this year a seal in collaboration with Aenor to acknowledge progress made in this area within the sector —including the adoption of new A2L refrigerant gases, which, although also fluorinated, have a far lower Global Warming Potential (GWP), significantly reducing Carbon dioxide emissions.

"From Aldefe we continue working to advance other issues of great importance, such as the homologation of facilities, reducing administrative burdens for opening cold-storage installations, standardising safety rules according to the regulations of each Autonomous Community, and improving food-safety monitoring and inspection processes," emphasised the association's secretary general, Marcos Badenes.

The association is also working to tackle energy costs, which account for around 50 per cent of cold-storage operators' cost base, as well as addressing insurance coverage for cold-rooms, given the difficulties associated with fire-protection requirements in particular.

Transporte XXI
December, 2025

SUPPLY CHAIN | E-COMMERCE

SMOOTHING OUT RELUCTANCE

ONLINE GROCERY SHOPPING FOR FRESH AND FROZEN PRODUCTS CONTINUES TO GROW, ALTHOUGH AT A SLOWER PACE THAN OTHER SECTORS DUE TO CONSUMERS' LINGERING SENSORY BARRIERS

E-commerce in food and beverages across Europe reached 58 billion in 2024, according to Deloitte's latest report, Evolution of E-Commerce in Food & Beverage. Of this amount, 61 per cent corresponded to food and the remaining 39 per cent to beverages. The food and drink sector ranks fourth in online sales, behind fashion, electronics and leisure.

The United Kingdom is the leading market for online food sales by volume, followed by Germany, France, Italy and Spain. According to the report, Spain exceeded 8 billion in online food sales in 2024, marking a 203 per cent increase since 2019, the highest growth among neighbouring countries over this period. The report attributes this expansion, to a large extent, to the high proportion of people aged over 45 in Spain.

Online food and beverage sales are projected to grow by 97 per cent by 2030, representing more than 140 billion across Europe. In terms of market share, the United Kingdom will continue to lead in 2030 with a 13.7 per cent share, while Spain is expected to make a significant leap to 9.2 per cent, becoming the fourth fastest-growing country after Denmark, France and Sweden.

By product category, dairy, eggs, fruit and vegetables, nuts and snacks will see the strongest growth in online sales over the next five years, the report notes, pointing to a clear trend towards greater online availability of fresh products. All of this comes as retailers face new logistical challenges linked to the cold chain.

6%

IS THE SHARE OF CONSUMERS WHO BUY FOOD PRODUCTS EXCLUSIVELY ONLINE

Observatory

Domestically, the IX Observatorio de Comercio Electrónico en Alimentación (Food E-commerce Observatory) by the Spanish Association of Retailers, Self-Service Stores and Supermarkets (Asedas), prepared by the Complutense and Autonomous universities of Madrid, confirms the dynamism and evolution of this market.

According to the observatory, shoppers who buy food exclusively online represent 6 per cent of the total in 2025, a rise of 1.2 points compared with the previous year. Meanwhile, mixed or omnichannel consumers —those who combine online and in-store grocery purchases— have reached 29.4 per cent, up 7.1 points in just one year. For both exclusively online purchases and mixed formats, 2025 marks the highest level ever recorded.

The observatory shows that online food purchases are made for convenience (weight and volume) in 44 per cent of cases. A further 20 per cent is due to lack of time, 9 per cent due to better prices, and another 9 per cent because of the wider product variety. The main incentive for choosing online grocery shopping, according to the study, is the elimination of delivery charges.

The Asedas report highlights that fresh and frozen products are growing at a slower pace than other categories. "Sensory barriers continue to hinder online purchases," it states. In fact, food and hygiene is the category with the highest rejection of the online channel, with 50.4 per cent of the population never buying these products online. Asedas attributes this to the belief that "fresh products must be seen, touched and smelled".

Even so, confidence continues to grow, as buying fresh food online is becoming increasingly reliable. Fresh products now account for 24 per cent of online grocery purchases in 2025, compared with 20 per cent in 2024. Frozen products have also increased their share to 28 per cent, up from 23 per cent a year earlier.

Specialisation

Alcampo inaugurated its new Customer Fulfillment Center (CFC) last year in San Fernando de Henares (Madrid), a development that will drive the company's online business, according to managing director Américo Ribeiro.

Image of Alcampo's Customer Fulfillment Center (CFC).

The new facility is part of the digital proximity project launched in 2021 together with Ocado Solutions. Alcampo has invested 19.4 million in the CFC, which offers 26,500 square metres of storage space on a 60,000-square-metre plot. More than 300 people work in the centre, including staff from Alcampo, Ocado and logistics operator Salvesen Logística.

ONLINE GROCERY SALES REACH THEIR HIGHEST LEVEL IN HISTORY

ALCAMPO

The warehouse, which features advanced Ocado technology such as a robotic arm using computer vision, is designed to prepare up to 280,000 weekly orders placed through the company's website. Meanwhile, the application of Artificial Intelligence helps optimise receiving, sorting, picking, loadig and delivery, as well as tracking goods from the moment they enter the warehouse until they are loaded onto trucks.

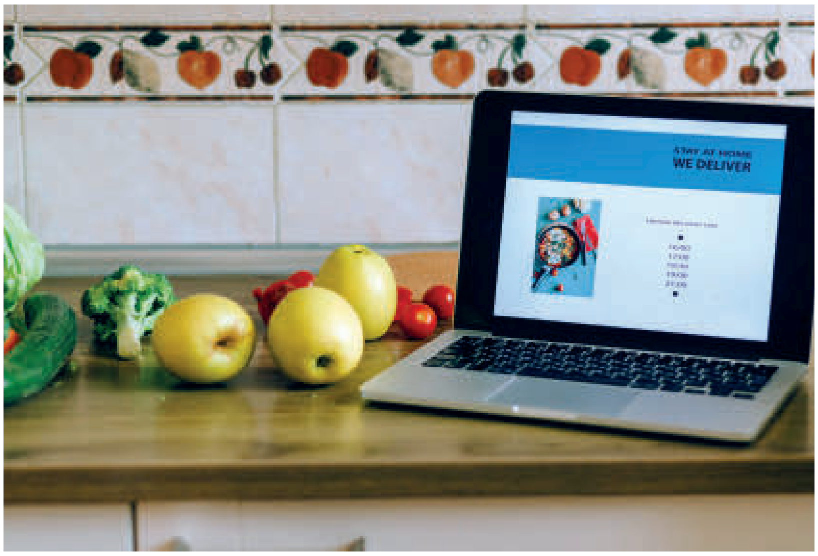
The CFC offers a range of more than 25,000 SKUs, including ambient, chilled and frozen products.

In the ambient zone, the temperature remains stable at 24 degrees, while the chilled area ranges between 2.7 and 2.9 degrees, and the frozen area reaches –20 degrees. Ambient products represent three-quarters of the total volume handled at the facility, chilled items being 22 per cent and frozen goods the remaining 3 per cent.

Another useful indicator of the evolution of temperature-controlled e-commerce can be found among the urgent transport companies specialising in this segment, both food and pharmaceutical sector —also in full expansion— which are also expanding rapidly. These include Seur, Correos, DHL and Nacex, among others.

Nacex Pharma, for instance, is a dedicated service for the shipment of temperature-controlled medicines, recently strengthened by the launch of the new reusable Pharma BOX isothermal container for products requiring storage between 15 and 25 degrees. Each box can be reused for an average of 70 shipments.

With this solution, Nacex offers healthcare customers controlled-temperature options between 2 and 8 degrees and between 15 and 25 degrees Celsius.



PACKLINK

Buying fresh products online is becoming increasingly reliable.

SUPPLY CHAIN | MARITIME TRANSPORT

REEFER CLIMBING AGAIN

MARITIME TRANSPORT STRENGTHENS ITS COMMITMENT TO CONTAINERISATION AS TRADITIONAL REEFER VESSELS FALL BELOW A 10% MARKET SHARE

Temperature-controlled maritime transport is basing much of its growth on the continued expansion of reefer containers, which surpassed the four-million-TEU mark in 2024, further eroding the market share of traditional refrigerated vessels to below 10 per cent.

The industry is deploying increasingly sophisticated smart-refrigeration technology to meet customer requirements in the pharmaceutical and food sectors, where full visibility of temperature and reefer location has become essential.

Among the operators responding to this demand is MSC, which transports more than one million refrigerated containers a year. In the past year, the group launched its iReefer system, allowing customers to track and monitor temperature-controlled shipments in real time from anywhere in the world. This global project involved connecting more than 210,000 refrigerated containers and equipping more than 500 vessels with iReefer technology. MSC's aim is to equip its entire fleet of TEUs and vessels with this system in the coming years.

4

MILLION REEFER CONTAINERS MOVED BY SHIPPING LINES

CMA CGM and Pacific International Line (PIL) are also participating in a pilot programme launched by SeaCube, Greensee and ThermoKing to lease net-zero refrigerated containers, supported by AI-based reporting.

ThermoKing —the supplier of the E-Coolpac electric genset for refrigerated containers— revealed that "reefers account for around 10 per cent of a ship's container capacity but can consume between 20 and 30 per cent of a vessel's total energy, significantly contributing to Carbon dioxide emissions."

Along similar lines of reducing the carbon footprint, ZIM joined "Move to -15" this year, an intersectoral alliance seeking to cut emissions across the cold chain by raising the standard temperature for frozen cargo from –18°C to –15°C. This small adjustment could prevent an estimated 17.7 million metric tonnes of CO emissions annually.

The Israeli carrier equips its reefer fleet with ZIMonitor, which provides real-time monitoring to ensure optimal cold-chain conditions.

Cosco Shipping has also expanded the deployment of various technologies —such as the Internet of Things (IoT)— across its refrigerated containers. More than 100,000 of these units are now fitted with the Ibox Reefer system, which ensures that the temperature inside the container remains between 15°C and 25°C while remotely monitoring cargo conditions and issuing alerts should any irregularities occur.

MSC launched its iReefer system last year

CMA CGM has further reinforced its refrigerated fleet with the purchase of five 2,259-TEU reefer containerships previously on long-term charter from Seatrade, paying around USD 30 million per vessel.

To replace them, the Dutch shipowner has placed an order with China's Huanghai Shipyard for a new series of 2,800-TEU vessels —two firm units and options for six more of the same class. These ships, the largest containerships Seatrade has ever ordered, will join the roughly ten vessels already in operation with capacity for 1,800 TEU.

CMA CGM strengthened its reefer fleet with the acquisition of five vessels.

FLEXIBILITY TO FACE CHALLENGES

The refrigerated container shipping industry continues to demonstrate its resilience and ability to adapt to persistent challenges —including unforeseen geopolitical tensions such as the Red Sea crisis, which is forcing vessels to reroute around Africa via the Cape of Good Hope instead of transiting the Suez Canal.

Another major challenge is the imbalance in reefer demand. Shortages are reported in major exporting regions such as South America and parts of Africa, where seasonal production of grapes, citrus, avocados and seafood reaches its peak.

By contrast, Asia is an importing region that receives a significant volume of empty refrigerated containers, yet repositioning them is slow due to limited vessel space.

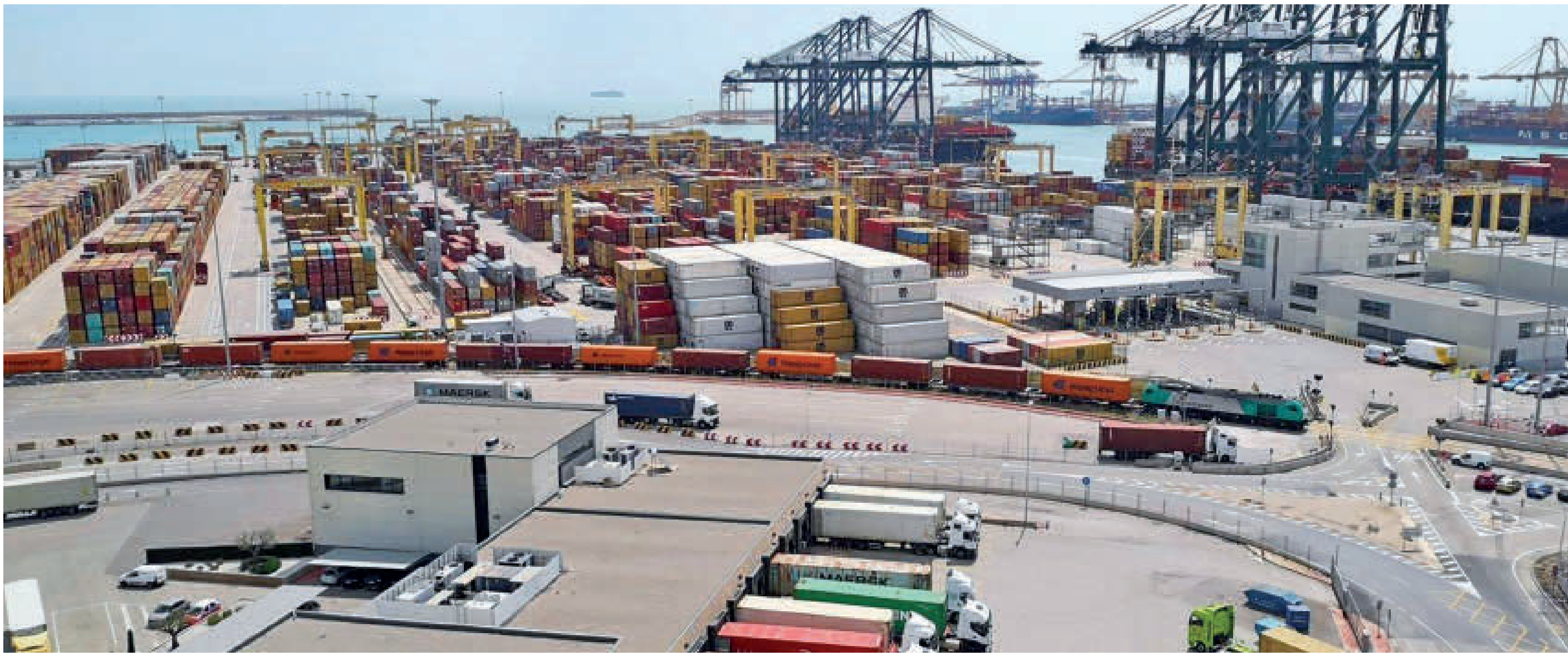
Despite falling oil prices, freight rates remain high owing to route diversions that extend transit times, as well as EU ETS surcharges —the emissions-trading scheme established by the European Union— which carriers are passing through to shippers.

New shipping alliances are settling in, and a rise in blank sailings is expected in the second quarter as carriers adjust to the new configuration and manage yields. These changes have not only extended vessel delivery times, but also reduced cargo flow, increasing delays.

Seatrade is renewing its 2,800-TEU ships.

Port congestion in Europe has worsened during the first half of this year, with more than 935,000 TEU awaiting berthing at anchorages in Northern Europe and the Mediterranean —representing 32 per cent of global queueing volumes.

Severe weather affected ports in Spain and Portugal, and Greece also experienced increased delays. In Northern Europe, Hamburg and Rotterdam continue to struggle with congestion, while Antwerp, Le Havre and Southampton are facing longer waiting times that add further pressure to cold-chain operations.



The Bay of Algeciras remains Spain's busiest port for the distribution of fruit and vegetable products.

SUPPLY CHAIN | MARITIME TRANSPORT

COLD CHAIN AS A VALUE GENERATOR

AGRI-FOOD FLOWS REMAIN ABOVE 11 MILLION TONNES ACROSS SPAIN'S PORT NETWORK

BAHÍA DE ALGECIRAS AND VALENCIA ARE SPAIN'S TWO LEADING PORTS FOR REEFER TRAFFIC

Maritime traffic of fruit and vegetables through Spanish ports reached 11.3 million tonnes in 2024, a figure slightly lower than that recorded in 2023, according to official data from Puertos del Estado. These flows predominantly rely on container shipping to reach domestic and international markets.

The main Spanish ports handling refrigerated containers are Bahía de Algeciras and Valencia. To a lesser extent, Las Palmas, Tenerife, Barcelona, Cádiz and Vigo also maintain a significant market share, particularly through the operations of Maersk, MSC, CMA CGM and the Spanish carrier Boluda Lines, as well as reefer flows handled by Hapag-Lloyd, ONE and ZIM, all of which are strengthening their presence in this market.

Algeciras is Spain's leading hub for perishable cargo. The Port Authority highlights more than 750,000 tonnes of refrigerated containerised goods moved annually with Costa Rica, Peru, Egypt, Colombia and Ecuador as its main trading partners. Pineapple, avocado, banana and citrus are the flagship products handled across its container terminals, which offer 5,500 monitored reefer plugs operating 24/7.

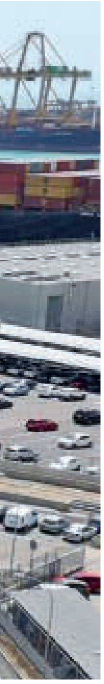
Alongside these flows, the port also moves Strait traffic, channelling all kinds of imported and exported fruit and vegetable products between Europe and Africa,

FRUIT AND VEGETABLE CARGO LOSES MOMENTUM

Fruit and vegetable traffic fell by 5 per cent across Spain's port system, totalling 11.3 million tonnes, with Algeciras leading the ranking.

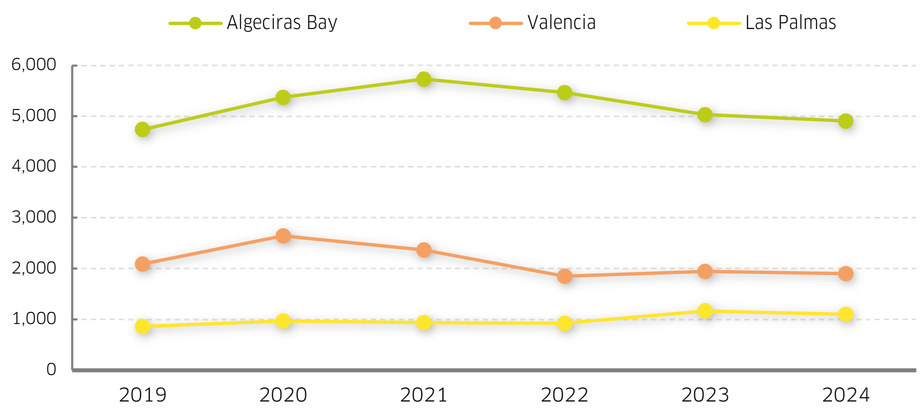
	2024	%24/23	%24/19	2023	2022
Algeciras Bay	4,904	-2%	+3%	5,027	5,465
Valencia	1,902	-2%	-9%	1,945	1,849
Las Palmas	1,099	-6%	+28%	1,166	924
S.C. Tenerife	592	-5%	+1%	621	503
Barcelona	571	+4%	-70%	549	662
Cádiz Bay	406	-1%	+34%	409	364
Vigo	294	+25%	>999%	235	184
Tarragona	277	-47%	+47%	518	155
Motril	165	-9%	+81%	181	7
Huelva	162	-6%	+44%	172	147
Cartagena	157	-26%	+50%	210	46
Baleares	109	-10%	-24%	121	146
Bilbao	107	-13%	-36%	123	124
Almería	105	+1%	+44%	104	123
Málaga	93	+16%	+86%	80	108
Alicante	77	-4%	-44%	80	106
Gijón	76	-32%	-14%	112	65
Sevilla	70	-26%	-19%	94	51
Santander	65	-20%	+131%	81	41
Castellón	36	-24%	-6%	48	19
Marín - Pontevedra	19	>999%	-87%	0	0
Melilla	11	-2%	-35%	12	15
Vilagarcía	1	-54%	-93%	3	4
Ceuta	1	+5%	-91%	1	1
TOTAL	**11,299**	**-5%**	**-6%**	**11,904**	**11,113**

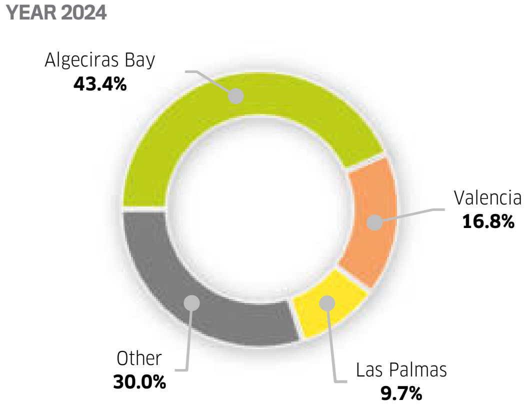
Thousands of tonnes. 2024, provisional. Source: Puertos del Estado.


APM TERMINALS

PERISHABLE CARGO STRENGTHENS THE VALUE ADDED OFFERED BY SPANISH PORTS

The ports of Bahía de Algeciras, Valencia and Las Palmas handled 70 per cent of fruit and vegetable traffic during 2024.





Thousands of tonnes. 2024, provisional. Source: Puertos del Estado.

REEFER TRAFFIC ACROSS SPANISH PORTS FELL BY 5% IN 2024

with tomatoes, berries and avocados standing out.

The Port of Valencia continues to strengthen its logistics services for perishable cargo, a vital sector for many Spanish industries, channelling 1.9 million tonnes of fruit and vegetable products through its quays thanks to its 3,250 reefer connections.

In third place is the significant volume handled by Puertos de Las Palmas, which has become the main distribution hub for fresh goods in the Canary Islands and a strategic node for redistributing agricultural products from southern Africa to the north of the continent and western Mediterranean.

In 2024, Puertos de Las Palmas handled 1.1 million tonnes, of which 71 per cent corresponded to cargo moved in containers, with the remainder transported via ro-ro traffic.

Transporte XXI
December, 2025

Terminals and logistics operators are increasing their investments in perishable cargo flows across Spanish ports.

SUPPLY CHAIN | MARITIME TRANSPORT

COOL RUNNINGS

SPAIN'S REEFER CAPACITY CONTINUES TO GROW, CONSOLIDATING ITS ROLE AS A STRATEGIC LEVER FOR INTERNATIONAL TRADE

Cold-chain logistics continues to gain ground in Spanish ports. Throughout 2024, these gateways strengthened their position as strategic platforms for the global movement of perishable cargo. With specialised infrastructure, an increasingly robust reefer fleet and expanding intermodal connectivity, the national port system has established itself as a benchmark in temperature-controlled maritime transport.

Refrigerated container traffic is particularly concentrated in ports such as Bahía de Algeciras, Valencia, Las Palmas and Barcelona. These ports, along with Vigo, Cádiz and Santa Cruz de Tenerife, have developed advanced capabilities to meet the growing demand for fruit, vegetables, seafood and other perishable goods destined for Europe and sourced from Latin America, Africa and Asia.

In this context, Bahía de Algeciras retains its leadership as Spain's number-one port for refrigerated container traffic, with more than 5,500 active reefer plugs and steady flows with Costa Rica, Colombia, Ecuador, Egypt and Peru. The port also plays a key role as a logistics node for fruit and vegetable movements between Europe and Africa via the Strait.

Valencia, meanwhile, has taken a major step forward by positioning itself as a Mediterranean hub for reefer traffic. With more than 3,250 electrical connections for refrigerated containers and strong maritime connectivity, the port now channels around 5 per cent of its total throughput in temperature-controlled cargo, equivalent to 250,000 TEU per year.

ALGECIRAS LEADS PERISHABLE CARGO TRAFFIC

Part of this volume is linked to transhipment, which accounts for half of all reefer containers handled, with a significant share originating in South America. Rising demand has accelerated the need to reinforce inland links. The port's objective is to activate new rail services dedicated specifically to refrigerated cargo, complementing the regular train already operating between Valencia and Zaragoza. It is also working to launch an international rail

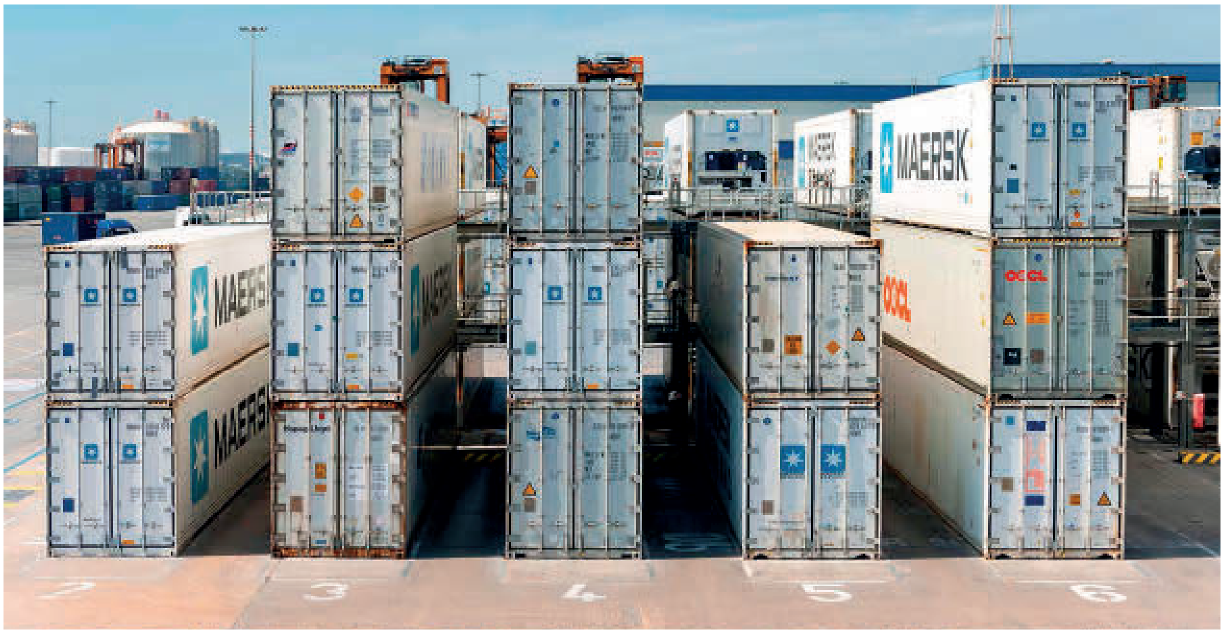
A.P. DE VALENCIA

corridor to Rotterdam, with a subsequent extension to Oslo, aimed at transporting citrus fruit to Northern Europe.

The Port of Las Palmas stands out as the main distribution centre for fresh goods in the mid-Atlantic. In 2024, the port exceeded one million tonnes of perishable products handled, with a clear orientation towards the refrigerated container, which already represents 71 per cent of total throughput. Its strategic location makes it a redistribution platform linking West Africa, the Mediterranean and both, North and South America.

Likewise, the Port of Barcelona has continued to expand its reefer infrastructure, with a capacity exceeding 2,500 electrical connections for refrigerated containers. In 2024, the port once again recorded sustained growth in the movement of temperature-controlled cargo, both in the fruit and vegetable segment and in seafood and pharmaceutical products. Its position on Spain's eastern seaboard, the consolidation of direct routes with the Middle East, Africa and South America, and its integration with inland logistics platforms via rail links have all strengthened its role as a strategic logistics hub in the Western Mediterranean.

Reefer container operations at the Port of Barcelona.



APM TERMINALS

RAIL, AN OPPORTUNITY TO CAPTURE MORE FLOWS

Barcelona also maintains an active public-private collaboration framework for the development of cold-chain logistics services, driving investment in digitalisation, energy efficiency and sustainable refrigeration.

The dynamism of the reefer market is accompanied by significant operational challenges. Congestion at some terminals, the impact of rerouted services due to the Suez Canal crisis, water shortages affecting the Panama Canal and new shipping-alliance configurations are all putting pressure on port operating capacity. Added to this are sustainability requirements pushing the sector towards more efficient, lower-emission logistics models, such as the use of biofuels and low-carbon intermodal solutions.

Spain's port system is responding with continuous investment in technology, digitalisation, value-added services and rail connectivity. Due to its high value, specificity and logistical complexity, refrigerated cargo is becoming a strategic asset within global supply chains. Far from being an auxiliary traffic segment, the reefer business is emerging as one of the key growth vectors for ports seeking to position themselves as reference logistics hubs in a constantly evolving international trade environment.

Transporte XXI
December, 2025

SUPPLY CHAIN | MARITIME TRANSPORT

STEP UP FOR A NEW ERA OF GROWTH

AP. DE ALGECIRAS

Maritime operations at the Port of Algeciras.

MORE THAN HALF A MILLION TRUCKS CROSS THE STRAIT EACH YEAR WITH A STEADY FLOW OF PERISHABLE GOODS FROM NORTH AFRICA, USING THE PORT OF ALGECIRAS AS THEIR MAIN DISTRIBUTION HUB FOR THE EUROPEAN MARKET

The Port of Algeciras once again demonstrated in 2024 its pivotal role as a key logistics node along the Europe–Morocco corridor, amid sustained growth in freight volumes. The Andalusian gateway recorded a 10.29 per cent increase in industrial vehicle traffic, surpassing 505,000 units. The route with Tanger Med stood out in particular, handling 471,766 vehicles, while traffic with Ceuta exceeded 33,600.

These figures reflect growing pressure on the port's infrastructure and management services, which are responding with significant measures aimed at reinforcing capacity and efficiency.

Among the most relevant initiatives is the expansion of the Border Control Post (BCP), which will double its operational capacity with a new inspection building featuring 18 loading and unloading bays and an estimated investment of 10 million.

This new facility, scheduled to enter service in 2027, will support the rise in traffic involving non-animal-origin products for human consumption — especially fruit and vegetables imported from Morocco.

The expected increase in inspections, together with EU regulatory requirements, has made this project essential, enabling improved management of truck positioning and a reorganisation of waiting areas.

Traffic trends clearly justify this expansion. Between 2016 and 2022, physical inspections carried out by Plant Health authorities in Algeciras tripled, rising from 6,432 to 19,979. The number of processed cases also increased sharply, from 46,848 to 127,220.

Similarly, Soivre processed more than 229,000 cases in 2022, compared with 162,000 in 2016.

Rising traffic has also prompted other internal management measures. In March 2025, the Port Authority activated a new access-control system for heavy vehicles, restricting entry to trucks without proper documentation, transport orders or booking confirmations.

The goal is to prevent parking-area saturation, enhance safety and eliminate practices such as prolonged stays by non-operational vehicles, many of which were used for cabotage or lacked insurance.

The road-haulage community has welcomed the measure, which does not affect vehicles engaged in active operations or those with reserved zones, and which contributes to a more professional access and internal traffic environment.

In parallel, the port's two major container terminals, APM Terminals Algeciras and Total Terminal International Algeciras, have extended their opening hours for truck services, operating from 02:00 to 20:00 as part of a three-month trial.

This extension responds to increased queues at terminal gates and aims to facilitate a smoother flow of inland haulage operations.

The Port Authority is also in discussions with Customs to optimise exit times and minimise bottlenecks, particularly during peak periods.

Intermodal Boost

These measures are complemented by the enclave's intermodal push through the launch of the Algeciras–Zaragoza rail motorway, an infrastructure that will allow semi-trailers to be transferred directly from road to rai, improving transport efficiency and easing congestion on the southern Spanish road network.

This project is key to decarbonising freight transport by promoting rail as a sustainable long-distance alternative to trucking.

It will also provide faster, more efficient outbound routes for refrigerated and industrial cargo to inland and northern Spanish markets, with a natural extension towards the rest of Europe.

10%
GROWTH IN STRAIT OF GIBRALTAR TRAFFIC IN 2024

The development of the Bahía de Algeciras Logistics Area, specifically in its San Roque sector, further contributes to this transformation.

Transportes Calsina & Carré will invest 6 million in a secure parking facility with 250 spaces and a 2,000-square-metre cross-docking platform, located on a logistics plot of more than 36,000 square metres.

This ESPORG-certified site will enhance services for hauliers and strengthen the port's inland connectivity.

The operation forms part of the company's expansion plan across Morocco and Tunisia, and in 2024 it completed more than 21,800 trips between Spain and North Africa.

All these measures underscore the Port of Algeciras' position as a top-tier strategic infrastructure, ready to absorb continued growth in trade with Morocco, manage high value-added traffic such as fruit and vegetable shipments, and offer multimodal logistics solutions to an increasingly competitive and demanding market.

With improved control, expanded capacity and stronger intermodality, Algeciras is positioning itself to consolidate its role as southern Europe's leading logistics hub by 2030.

SUPPLY CHAIN | MARITIME TRANSPORT

A COLD-CHAIN GATEWAY TO AFRICA

THE LAUNCH OF THE REGULAR LINE FROM HUELVA TO TANGER MED, DRIVEN BY SUARDIAZ AND GTO, STRENGTHENS A NEW ALTERNATIVE IN THE STRAIT OF GIBRALTAR FOR THE DISTRIBUTION OF REFRIGERATED CARGO BETWEEN EUROPE AND AFRICA

Suardiaz vessel deployed on the Huelva-Tanger Med route.

The Port of Huelva is consolidating its position as one of the Spanish port system's rising hubs, thanks to its strong commitment to African trade lanes, the development of specialised ro-ro infrastructure and the roll-out of its emerging cold-chain logistics hub at the South Quay (Muelle Sur).

In 2024, the port surpassed the symbolic threshold of 100,000 TEU for the first time, handling 106,800 containers, an annual increase of 20.3 per cent, boosted largely by new regular services with Casablanca (Morocco) and connections with Spain's Mediterranean ports.

This progress is also reflected in general cargo, which reached 1.7 million tonnes, up 21 per cent, and in the gradual expansion of ro-ro traffic. Although the 30,600 ITUs handled on the Canary Islands route marked a slight decline of 10 per cent, the strategic positioning of Muelle Sur and its intermodal connectivity are generating fresh momentum. The entry into service of new ro-ro lines with Africa —notably the route launched by Suardiaz Group and GTO between Huelva and Tanger Med— confirms this trend.

The new ro-ro connection, which began in March 2025, offers six weekly rotations with transit times of six hours, operating with the vessel Super Fast Levante, which has 1,900 lane metres of capacity. This service, oriented towards unaccompanied cargo —both dry and refrigerated— provides a direct, reliable alternative to traditional Strait routes, ensuring fast access to Morocco for logistics and agri-food operators. The partnership with GTO, one of Spain's largest refrigerated-transport fleets, reinforces the strategic nature of this maritime corridor.

In parallel, the Huelva Port Authority has mapped out an ambitious infrastructure programme, with 75 million in planned investment for 2025 and a 280-million five-year plan (2024–2028). Among the key projects is the construction of a dual ro-ro ramp which, combined with the existing facility, will allow up to four vessels to operate simultaneously on ro-ro services. The project, currently under way, represents an investment of 19.4 million.

Cold-Chain Logistics Hub

One of the most innovative initiatives is the development of the port's 'Cold-Chain Logistics Hub', located at Muelle Sur next to the ro-ro and container terminals and in close proximity to the Border Control Post (BCP). The objective is to transform Huelva into a reference centre in southern Europe for temperature-controlled cargo flows to and from Africa and northern Europe.

This hub is built around a pioneering model: the use of residual cold generated during the regasification process at the Enagás LNG plant, which is also located within the port. Through a dedicated cold-distribution pipeline (the frioducto), the port will supply low-cost, high-efficiency energy to refrigerated facilities. The investment for this network amounts to 5.5 million, financed with European funds under the Recovery and Resilience Facility.

The main platform will be operated by Frigoríficos Portuarios del Sur (Friportsur), which runs a 32,550 square-metre multipurpose cold-storage facility designed as a highly specialised logistics centre for the storage and transit of frozen and chilled goods. This model eliminates the need for companies to build and maintain their own refrigeration systems, significantly reducing operating costs and delivering energy efficiency, sustainability and scalable logistics capacity.

€ 280 MILLION WILL BE INVESTED IN THE PORT OF HUELVA OVER THE NEXT FIVE YEARS

The Port of Huelva closed 2024 with a total throughput of 31.1 million tonnes, representing growth of 3.4 per cent. Liquid bulk traffic approached 24 million tonnes (+5 per cent), while dry bulk reached 5.2 million tonnes, albeit with a slight drop of 6.8 per cent. This balance between traditional cargo streams and new specialised services underscores the port's expanding diversification strategy.

In short, the Andalusian Port has begun to play a much more prominent role in the Iberian logistics landscape. With the development of its cold-chain hub, new maritime connections, the expansion of Muelle Sur and a clear commitment to energy sustainability, Huelva is emerging as an intercontinental port with an Atlantic identity and a strong agro-export vocation, poised to lead the logistics corridor with Africa from Andalusia.

SUPPLY CHAIN | MARITIME TRANSPORT

FOGGED-UP ADVANTAGES

THE BENEFITS OF SHORT SEA SHIPPING FOR REFRIGERATED HAULIERS ARE UNDENIABLE, ALTHOUGH THE 'ETS' SCHEM IS HAVING A NEGATIVE IMPACT

Refrigerated hauliers who load their trailers onto a vessel are well aware of the advantages of short sea shipping (SSS). These advantages are "enormous from every point of view", particularly in light of "transport policies seeking greater intermodal balance", says Pilar Tejo, Technical Director of the Spanish Association for the Promotion of Short Sea Shipping (SPC-Spain). For this reason, its future "should be more than promising". What's more, "changes in supply chains, making them shorter, will probably drive SSS flows even further if efficient routes are consolidated," she adds.

SHORTER SUPPLY CHAINS SHOULD FURTHER BOOST FLOWS

However, it is not all smooth sailing: "The problem is the lack of alignment between transport and environmental policies which, incidentally, are supported and promoted by the maritime sector itself, since all shipping lines are making major investments to reduce their environmental footprint." This commitment to zero emissions persists "despite the fact that, today, no green-fuel solution exists for the maritime mode".

The observatories periodically compiled by SPC-Spain do not break down temperature-controlled cargo from overall volumes. Nevertheless, "our perception, based on the data we handle, is that there has been some decline." As with other cargo types, this is due to "the extra costs arising from the application of the 'ETS', which are having negative repercussions on short sea shipping and therefore also on temperature-controlled goods." These higher costs "may be making the maritime mode less attractive compared with pure road transport".

SPC-Spain calls for North Africa to be included in the eco-bonus scheme

It must not be forgotten that, unlike deep-sea traffic —which has no alternative, and where the additional ETS cost is spread along the supply chain— short sea flows "have the option of shifting back to road, making it a matter of competitiveness," Tejo explains.

Hauliers, despite their efforts, "cannot always pass the extra cost (from the ETS) on to their customers", unlike deep sea shipping "where we have seen shipping lines publishing their surcharges for this concept". Ultimately, the customer —the shipper— is the one who decides, and undoubtedly "at least some of them will return to road transport if using SSS services becomes more expensive".

'Eco-incentives' could be "a good remedy" for ETS impacts, although to achie-

ve this, “they would need to be modified”. The results of the latest call for applications for ‘eco-bonuses’ have been “more than disappointing”. In fact, the effect “has been counterproductive”. The outcome “is much worse than if they had not existed at all”, since “the expectations created among hauliers and customers have been frustrated”.

Only 52 transport operators applied for eco-bonuses for the services they carried out between 29 April 2023 and 31 March 2024 on any of the 13 short sea shipping routes included in the second call of the aid scheme designed to encourage trailers to shift to sea, launched by the Ministry of Transport under the NextGeneration funds. And only 15 companies were awarded aid, according to the provisional list published at the time by the Ministry. These 15 firms received a combined total of 1.72 million. Given that the allocation for this second call amounted to 20 million, 91.4 per cent of the eco-bonus funding remained unused.

The first call resulted in 47 transport operators applying, with 43 receiving aid amounting to 6.8 million out of the 10 million available.

SPC-Spain has called for the redesign of the eco-bonus system to achieve greater reach and effectiveness. In its view, this requires simplifying the application process —both for shipping lines and for beneficiaries— as well as “including other routes of interest, such as links with North Africa or the United Kingdom”. Furthermore, “it would be very important to guarantee temporal continuity to build confidence”, the expert concludes.

Shipping lines are investing to reduce their environmental footprint.

ALMOST FOUR PER CENT MORE

Global short sea shipping (including cabotage and bulk cargoes) totalled 269 million tonnes in 2024, a 3.7 per cent increase compared with the previous year, according to the latest observatory published by SPC-Spain.

Growth was stronger in international traffic (+4.2 per cent) than in cabotage (+2.2 per cent). By form of presentation, the best performance came from container traffic (+9.3 per cent), while dry bulk fell by 6.6 per cent.

Ro-ro cargo carried on international services (excluding vehicles shipped as cargo) reached 25.3 million tonnes last year, representing a 3.7 per cent decrease compared with 2023. However, performance differed significantly between coasts. While the Atlantic façade saw double-digit growth of 17.8 per cent, the Mediterranean façade ended the year with a 6.7 per cent decline. Mediterranean ports still handle nearly nine out of every ten tonnes of international ro-ro SSS.

17.8%

GROWTH OF THE INTERNATIONAL ATLANTIC RO-RO SSS

The drop in the Mediterranean arc is largely attributable, the Observatory notes, to flows with Morocco (–11 per cent) following exceptionally high levels in 2022 and 2023. Traffic with Italy remains stable, while the Algerian market saw remarkable growth of +183 per cent, reflecting the resumption of trade relations between Algeria and Spain at the end of last year.

By contrast, developments on the Atlantic façade are explained by increases in traffic with all partner countries, especially Belgium (+36.2 per cent), but also the United Kingdom (+12.1 per cent), France (+8 per cent) and Ireland (+6.5 per cent), according to SPC-Spain’s analysis.

In relation to road transport, international ro-ro short-sea shipping captured 10.9 per cent of demand for international freight movements in 2023 (the last year included in the report), up from 10.5 per cent in 2022. Italy and the United Kingdom remain the countries where ro-ro SSS holds the strongest market share, with Italy reaching 49.4 per cent. Belgium also stands out with a share above 20 per cent.

Image of Zaragoza Maritime Terminal (TMZ), which has launched the second phase of its expansion.

SUPPLY CHAIN | RAIL TRANSPORT

A NICHE OF OPPORTUNITY

REEFER CONTAINER RAIL TRAFFIC IN SPAIN NOW AVERAGES AROUND 40 WEEKLY SERVICES, OFFERING COMPETITIVE ADVANTAGES IN CUTTING CARBON FOOTPRINTS

Rail freight is staking much of its future on the decarbonisation of transport. This “green” transition gives it an added advantage over the dominant force in land transport: the road sector. In this context, refrigerated rail freight is emerging as an increasingly attractive alternative for reducing the carbon footprint.

Reefer container traffic by rail is approaching 40 weekly frequencies in Spain and continues to expand with new connections. For example, at the time of going to press, the Port of Valencia was working to introduce a new service to northern Spain, with refrigerated connections to Madrid, Valladolid, Bilbao and Vigo, as well as an extension of reefer services to Navarra on the Valencia–Zaragoza corridor. At the same time, private operators are planning to launch a refrigerated rail service from Valencia to Oslo, focused on citrus shipments.

Among the established refrigerated rail services is the one operated by Renfe Mercancías for Maersk. These connections link the Port of Algeciras with the Madrid-Abroñigal terminal, continuing onward to the Port of Marín. On the Abroñigal route, the cargo consists mainly of fruit and vegetables destined for Mercamadrid, while on the Marín service, the predominant cargo is frozen fish.

To enable this refrigerated transport, trains are equipped with two generators: one operating throughout the journey and the second on standby, ready to activate should the first fail. The wagons receive power from the generator via a wiring system running the entire length of the train, ensuring uniform and constant refrigeration that keeps the cargo in optimal condition.

According to Renfe, this reefer-container service provides “an efficient, cost-effective and regular transport alternative”, while also “offering a significant reduction in CO_2 emissions, sharply reducing handling, preventing breaks in the cold chain and ensuring that the product can be delivered directly to the customer, avoiding intermediate loading and storage steps.”

25th
ANNIVERSARY OF TERMINAL MARÍTIMA DE ZARAGOZA (TMZ) ACHIEVED IN 2025

Inland Hub

One of Spain’s leading facilities for refrigerated rail flows is the Zaragoza Maritime Terminal (TMZ), which features a dedicated yard for reefer containers, equipped with structures and connections for temperature-controlled storage, along with adjacent warehouses for customs inspection services.

TMZ, which celebrates its 25th anniversary this year, maintains daily temperature-controlled rail services with the Port of Barcelona for both export and import flows of chilled and frozen products.

In this context, TMZ is moving ahead with the second phase of its expansion. This phase includes the construction of a new rail connection to the northeast, which will turn TMZ into a pass-through terminal. The project will create a rail junction linking the terminal’s three existing tracks with the line connecting to Catalonia, northern Spain and Madrid. The works were recently awarded to the Aragon-based construction firm Coalvi for a sum of 4.3 million.

This project follows the completion of the first phase of the


TMZ

expansion in November last year, which involved an investment of 5 million. As a result, TMZ increased its footprint by 30,000 square metres, reaching a total of 180,000 square metres. At the same time, the terminal extended its tracks to accommodate longer trains, and its container-storage capacity rose by 50 per cent, now exceeding 10,000 units.

Specialised Terminal

For its part, Athos Rail continues to strengthen its intermodal strategy with the consolidation of operations at its Fuenlabrada (Madrid) terminal, inaugurated last year with a clear focus on refrigerated container movements. Since December 2024, the Athos Rail terminal has operated weekly trains connecting with the Port of Huelva. The trains running on this route move an average of 34 containers per service.

The company's forecasts aim for six weekly trains during the current year, with a goal of reaching nine or ten weekly services once the terminal operates at full capacity. If these targets are met, the terminal will end the year with traffic equivalent to around 10,000 containers, growing to nearly 17,000 containers annually once it reaches full operational performance.

The Athos Rail terminal in Fuenlabrada has an 18,000-square-metre slab area, expandable to 27,000 square metres within the same plot, with additional adjoining plots also owned by the group. The platform's storage capacity exceeds 300 containers. The facilities specialise in reefer flows (frozen and chilled), and Athos Rail confirms that the ability to handle refrigerated containers is a competitive advantage highly valued by customers.

Athos Rail is also boosting its intermodal activity by leveraging synergies with the group's logistics operator, Athos Innovaciones Logísticas, which specialises in food logistics at three temperature ranges (ambient, chilled and frozen). The logistics operator handles consolidation and deconsolidation of cargo, as well as last-mile deliveries, enabling Athos Rail to provide a full-service solution from cargo pick-up through to final delivery.


TXXI

Athos Rail operates a specialised cold-chain terminal in Fuenlabrada.

SUPPLY CHAIN | RAIL TRANSPORT

A NEW ROUTE FORWARD

RAIL MOTORWAYS ARE EMERGING AS THE GREAT HOPE FOR SHIFTING PART OF THE FREIGHT MOVED BY ROAD HAULIERS ONTO RAIL

The introduction of refrigerated trains into the freight market opens new opportunities for companies working with perishable goods within the broader strategy of sustainable transport, Renfe reminds us. Rail "allows the long-distance transport of significant volumes of frozen or chilled foods that arrive at their destination in perfect condition," they emphasise.

However, the reality is that there is still a long way to go. Rail freight remains marginal for companies in the Fast-Moving Consumer Goods (FMCG) sector, according to the latest Intermodality Diagnostic published by Aecoc (Asociación Española de Codificación Comercial).

RAILWAY AS AN ALTERNATIVE FOR PERISHABLE GOODS

For 84 per cent of companies in the sector, rail accounts for less than 5% of their transport operations, and it only exceeds 20% for a tiny 1% of companies, the report notes. One hundred companies in Spain's FMCG sector took part in the study, representing more than 80% of the goods moved by the sector as a whole. The report states that rail represents between 5% and 10% of total transport operations for 12% of companies, and between 10% and 20% for 2% of respondents.

Among the main reasons why Spanish FMCG companies do not use rail, 55 per cent cite transit times that do not fit their needs, 43% mention a lack of awareness of the offer, 22% point to reliability issues and 11% refer to negative past experiences. Among companies that do use rail, environmental reasons carry the most weight, although, as the report underlines "16 per cent use the train because they consider it more competitive, which is not insignificant."

An image of a VIIA rail-motorway operation departing from the Bettembourg terminal.

84%

SPANISH FMCG COMPANIES USE RAIL FOR LESS THAN 5% OF THEIR TRANSPORT OPERATIONS

Aecoc's Intermodality Diagnostic also shows that 81% of respondents do not believe the modal share target of 10% set by the 'Mercancías 30' initiative will be achieved. This figure has risen by four points compared with last year's analysis and by five points compared with the year before.

Rail Motorways

In this context, Ángel Casado, Sales Manager Iberia & France & Maghreb at VIIA, highlights the need for intermodality to adapt to road transport companies —not the other way around. In that sense, the secret of VIIA, which currently operates around 30 weekly connections between Le Boulou and Bettembourg, "is being complementary to road transport, because the rail motorway model is the railway adapting to the road," he insists.

Rail motorways are positioned as the most suitable solution for getting road hauliers onto rail. Interest remains strong, judging by the proposals being submitted to the Support and Advisory Office for Rail Motorway Deployment (OAA). The Adif-dependent office currently has around 20 proposed rail motorway corridors in Iberian gauge on the table from various operators, along with four more in standard or international gauge. Among the latest developments are two new routes in the north-west of the peninsula with origin and destination in Vigo, as well as a Málaga–Azuqueca–Burgos connection.

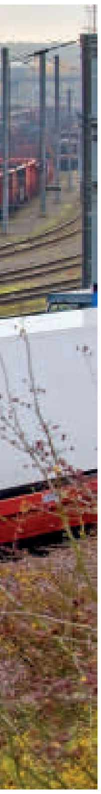
The infrastructure required to launch these rail motorway routes hinges on loading gauge, due to the characteristics of the special P400 wagons, which require greater clearance. This is prompting Adif to carry out works on tunnels and overpasses or bridges. Aside from the Valencia–Madrid rail motorway in Iberian gauge and the Barcelona–Le Perthus route in standard gauge, both already operational. The rest of the corridors are currently in the works: under construction, contracted, or at the design-project stage.

The Algeciras–Madrid–Zaragoza rail motorway is the corridor with the highest projected traffic volumes, spanning 1,074 kilometres. Along this route there are 369 overpasses, 131 of which do not meet the required loading gauge, as well as 54 tunnels, 43 of which will also require adaptation. In addition, Adif will extend tracks to 750 metres at a total of 17 stations.

Increasing train length has been one of the sector's biggest demands for decades. To operate longer trains, infrastructure must also be adapted, and one of the critical elements are the passing loops.

Passing Loops

As part of its strategy to boost freight traffic and intermodality on its network, Adif has embarked on the extension of station passing loops to 750 metres. "This initiative increases the operational capacity of the rail infrastructure for these services by allowing parking and crossing of trains of standard interoperable length compatible with European networks," Adif stresses. Over the past five years, Adif has invested nearly 400 million in extending passing loops to 750 metres.



The Spanish rail network currently has 175 operational 750-metre passing loops. Adif is carrying out works to extend 31 additional loops. Meanwhile, contracts for extending 26 more have already been tendered. At the same time, 21 further loop extensions are at the project stage. According to Adif's current planning, by 2027 the network will have 253 operational passing loops.

Extending passing loops to 750 metres "facilitates operations and train movements in transit, improves the capacity, efficiency and competitiveness of rail lines, and reduces both external and internal freight-transport costs," the public company highlights.

Many of these works are being carried out under agreements between Adif, Puertos del Estado and the various Port Authorities, financed through the Port Land Accessibility Financial Fund, which aims to promote intermodal freight transport.

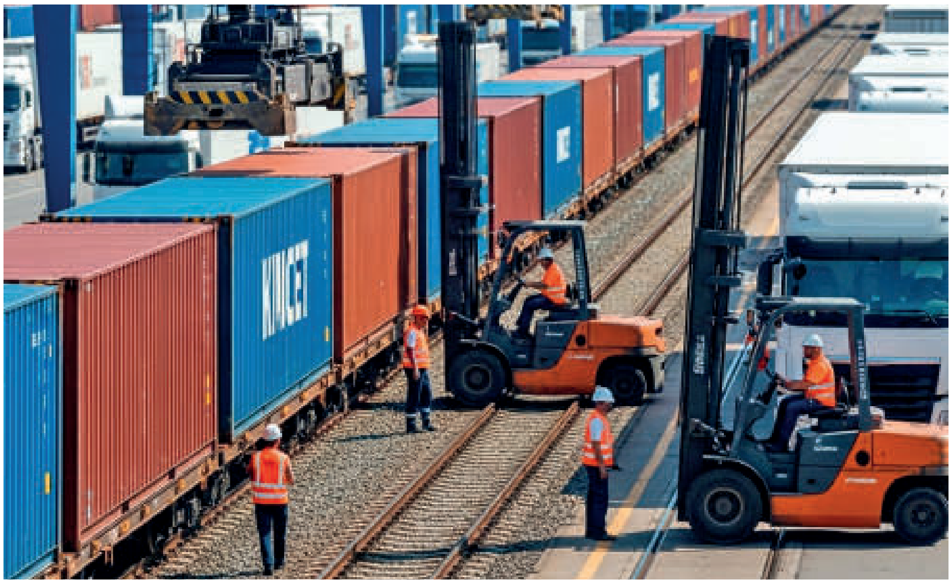
QUALITY INDICATORS

Adif has launched a project to establish a system of quality indicators at its seven strategic intermodal rail terminals. The aim of the project is to promote greater efficiency, transparency and collaboration among the various actors in the rail-freight logistics chain.

To achieve this, Adif has created the Technical Quality Working Group for Intermodal and Strategic Terminals, which includes the participation of the Spanish Shippers' Association (ACE). The group's mission is to define a common reference system that incorporates quality parameters to determine the level of service expected by customers.

ACE has surveyed its members to identify the main KPIs considered essential by shippers when evaluating the efficiency of rail freight transport. These KPIs include the average time a truck spends inside the intermodal terminal, the ability to recover processing times for delayed trains, and visibility on train dispatch delays caused by operational incidents.

Once the indicators have been agreed, the working group will begin measuring the truck dwell time in the terminal, covering all operations from the moment the vehicle enters the facility until it exits. In this regard, only trucks with a prior appointment and linked to a train whose origin and destination matches the terminal will be included, ACE explains.



ACE

Shippers analyse the key KPIs used to evaluate rail-freight efficiency.

SUPPLY CHAIN | AIRFREIGHT

A MATTER OF ALTITUDE

AIRFREIGHT FLOWS OF PERISHABLE AND PHARMACEUTICAL PRODUCTS HAVE RECORDED STEADY GROWTH IN RECENT YEARS

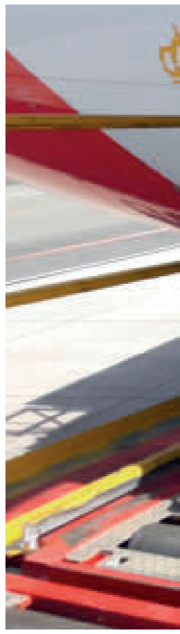
IBERIA

Image of an Iberia cargo operation at Madrid-Barajas.

Air cargo continues to show significant growth in the European market. According to data from ACI Europe, cargo volumes at European airports rose by 13.2 per cent in 2024 compared with the previous year. Airfreight also stood 11.8 per cent above the volumes recorded in the last pre-pandemic year (2019). This growth has been driven by the boom in e-commerce, but perishable goods and pharmaceutical products have also seen a major impact.

Looking at outbound flows from European airports by product category, air transport of meat saw year-on-year growth of 33 per cent, fruit and vegetables rose by 20 per cent, fish and seafood by 10 per cent, and flowers by 2 per cent. Meanwhile, exports of pharmaceuticals from Europe fell by 2 per cent. As for air cargo arrivals into Europe, meat increased by 13 per cent, fish and seafood by 11 per cent, pharmaceuticals by 6 per cent, and fruit and vegetables by 3 per cent, while flowers declined by 1 per cent.

In Spain, Adolfo Suárez Madrid–Barajas Airport handles over 60 per cent of the total cargo moved across Spanish runways. Furthermore, Barajas' share of EU–Latin America cargo traffic reached 27.2 per cent in 2024, positioning it as the leading airport on the corridor between Latin America and Europe. Barajas maintains strong connectivity with Latin America and the Caribbean, with 381 routes at the close of 2024, six per cent more than the previous year. Behind Madrid lie Paris–Charles de Gaulle with 113 connections (+3 per cent), Lisbon with 111 (+9 per cent), Amsterdam with 97 (–28 per cent) and London – Heathrow with 79 (–10 per cent).



The Latin American airports with the highest cargo volumes linked to Barajas are Bogotá, Lima, Mexico City, Buenos Aires, São Paulo and Santiago de Chile. In Madrid's airflows with Latin America, inbound volumes are dominated by food products, while machinery and electrical equipment, perfumery goods, foodstuffs and pharmaceuticals stand out in outbound flows from Madrid to Latin America.

Barajas

Adolfo Suárez Madrid-Barajas handled nearly 5,000 tonnes of exported food cargo last year, representing a 12 per cent decline, according to the Annual Report of Foro MADCargo. Meanwhile, export flows of pharmaceutical products at Madrid's airport reached around 4,000 tonnes, marking 18 per cent year-on-year growth. Food and pharma ranked third and fourth, respectively, in terms of cargo volumes at the Madrid airport, behind fashion goods and mechanical and electrical equipment.

In terms of imports, food remained the most significant category in Madrid, with over 32,000 tonnes and 14 per cent growth. Pharmaceutical imports exceeded 2,000 tonnes, though this represented a 5 per cent decline. Food imports have maintained an upward trend at Barajas, with continuous growth over the past five years.

Even so, Galo Molina, second vice-president of Alacat, acknowledges that "there is still much to do to strengthen Madrid as a global hub". He stresses the importance of connectivity, digitalisation and greater effort from the Spanish Customs authority. “In the case of perishables, if the logistics chain is disrupted due to sanitary issues, for example, this directly affects Latin American exports and pushes them towards other hubs that present fewer problems,” he warns. Along these lines, Molina calls for more dedicated flights and more direct flights between Madrid and Latin America.

Tomás Vázquez, Head of the Cargo Development Division at Aena, highlights the strong connectivity that Barajas already enjoys, and the significant opportunity it has as a gateway between the Latin American and Asian markets. “Currently, a large share of cargo coming from Latin America remains in Spain or has its final destination in Europe, but there is a great deal of cargo in transit to Asia, and that represents an opportunity,” he notes. Vázquez points out that 8 per cent of all cargo handled in Barajas comes directly from Chinese airports, and that “there is plenty of room to increase return flows to China”, an opportunity that “should be exploited further”.

Airfreight flows of pharmaceutical products are on the rise.

Meanwhile, Juan Fernández, Senior Manager Airline Cargo & Catering Services at IATA, emphasises that 75 per cent of air cargo moving between Latin America and Asia does so via Europe. “For example, Madrid is experiencing strong growth in this area, particularly in pharmaceuticals,” he notes.

6%

GROWTH WAS RECORDED IN CONNECTIONS BETWEEN SOUTH AMERICA AND MADRID IN 2024, REACHING A TOTAL OF 381 ROUTES

El Prat

At Josep Tarradellas Barcelona–El Prat Airport, the pharmaceutical and chemical sector ranks second in cargo volumes, only behind fashion. Pharma is the sector that exports and imports the most by air in Catalonia, occupying first place in outbound flows.

Air exports and imports of pharmaceutical and chemical products account for 18.2 per cent of total volumes, according to the latest report by Gestió i Promoció Aeroportuària (GPA), the airport consultancy of the Barcelona Chamber of Commerce, based on data from the Spanish Tax Agency between January and October 2024. Catalonia exported 19,305 tonnes of pharmaceutical products by air — growth of 31.2 per cent. Imports reached 5,487 tonnes, representing a 20.9 per cent decline.

Catalonia’s food sector ranks fifth in air volumes, with a 13.2 per cent share. This is mainly due to soaring airfood exports, which jumped 43.5 per cent to 6,418 tonnes, while imports grew more modestly by 13.4 per cent, reaching 12,232 tonnes, according to the same analysis.


valenciaport
Autoridad Portuaria de Valencia
All things great and small
loaded!
CONNECTING
valenciaport