OTLE

Observatorio
del Transporte y la Logística en ESPAÑA

Annual Report 2020

Executive Summary

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EXECUTIVE SUMMARY

Introduction

This annual report presents the main conclusions of the work carried out in the **eighth edition of the Transport and Logistics Observatory in Spain (OTLE)**. This latest edition has further developed awareness of the reality of transport and logistics carried out in previous editions, with the active participation and collaboration of the management centres of the Ministry of Transport, Mobility and Urban Agenda, their companies and associated entities, as well as other entities of the General State Administration and other entities in general.

With the aim of providing a comprehensive and analytical view of the reality of transport and logistics in Spain, OTLE is structured around the 5 main elements that are already known from previous editions: database, indicators, reports, website and conferences. In this regard, some of the main innovations that have been implemented over the last year include the following:

- **Review and re-evaluation of the existing contents** of the database with the clear objective of improving the display possibilities in the different tables. In addition, we have **improved the characterisation of the logistics sector**, a process in which we have enjoyed the invaluable collaboration of the National Statistics Institute (INE), in order to find out which companies have logistics as part of their secondary activities.

- **Publication and display of indicators in dynamic and interactive panels made with business intelligence tools**, which significantly increase the functionalities of OTLE users (customised filters and selections, improved graphic display or the possibility of downloading basic data), with implementation planned for the near future.

- Drafting of the **monographic report on Mobility and Transport in COVID-19 times**, which required the use of data with different characteristics to those generally analysed in the OTLE in terms of provisionality, frequency or origin.

- Inclusion in the near future of a **single search engine on the OTLE website** to facilitate navigation and consultation of the contents for users, as well as a glossary of terms, with the aim of facilitating the interpretation of piece of OTLE content.

- The **process of reassessing the indicators** begun in the previous edition has been completed. This process has culminated, after a critical analysis of all existing indicators, in a new panel comprising a total of 193 indicators distributed in blocks equivalent to those in the database.

General mobility and economic cycle

Overall, **2019 was a year in which mobility continued the growth path that began in 2013**. This growth was relatively homogeneous across modes and segments with some exceptions. Passenger transport continued with its good overall figures, although with nuances depending on the area analysed. Specifically, while international passenger transport rebounded by +4.6% in 2018 (last year with complete data), domestic passenger transport had a year-on-year growth rate of +1.2% in 2019. For its part, freight transport experienced positive growth rates in 2019, with domestic transport (+4.2% compared to the previous year) standing out against the more moderate increase in international freight transport (+0.8%).

In the **passenger segment, mobility as a whole increased in 2019** in relation to the figures observed a year earlier. Both national and international transport recorded **positive growth figures in all modes**. A major evolution is the **growth of passenger air transport** (+7.0% in internal mobility and +3.5% in external mobility), although other modes also increased in numbers although at somewhat lower rates.

In relation to **freight transport**, it also recorded **positive growth figures as a whole in 2019**, albeit with somewhat less homogeneity when broken down by modes and areas than that observed for passenger transport. In this sense, inland freight transport recorded a positive growth rate as a result of the good performance of road (+4.7%), which, being the mode that moves the largest volume of goods in the domestic sphere, more than offset the falls observed for the other modes. In the international sphere, on the other hand, growth is homogeneous, with all modes registering increases in their demand figures.

As in previous years, it can be stated that the evolution of mobility in Spain in the last year has followed a pattern marked by higher domestic demand coupled with a favourable international context that continues to expand. As a consequence, 2019 is the sixth consecutive year of growth in freight transport, as well as passenger mobility.

Road transport

For the sixth consecutive year, **vehicle traffic grew by +0.7% on Spanish roads as a whole in 2019**, according to data from the General Directorate of Roads. However, this growth has not been homogeneous across the different classifications usually analysed in OTLE. In particular, if we focus on the area of competence, growth was observed in the network of the autonomous communities (+1.2%) and in the State Road Network (+0.6%), in contrast to the decrease observed in the networks of the regional and local councils (-2.0%). This heterogeneity is also observed according to the type of road, where multi-lane roads (+10.6%) and free highways and motorways (+3.9%) increased their traffic, while toll motorways (-6.3%) and the conventional network (-2.8%) saw their traffic fall.

Road transport, on the other hand, **performed well in both the passenger and freight segments**. According to data from the General Directorate of Roads (DGC), passenger-km increased by +0.6% in 2019, an upturn that was greater for freight transport, with tonne-kilometre growth of +3.1% compared to the figures recorded a year earlier.

The analysis of the **freight transport by road through the data of the Permanent Survey of the Transport of Freight by Road (EPTMC) and Eurostat** shows that 2019 is the **sixth consecutive year with positive figures**, when all transport figures (tonnes and tonnes/km) and areas (national and international) experienced positive growth.

With regard to the **transport carried out by Spanish vehicles** that characterises the EPTMC, in 2019 the **transported tonnes increased again by +4.6%**, which includes both national and international flows. A breakdown of movements shows that intermunicipal transport registered the largest growth (measured in tons) (+5.1%), although other routes also registered positive growth rates.

Once again, **the autonomous communities with the most intra-regional freight traffic were Andalusia, Catalonia and the Valencian Community**, which accounted for 51% of the tonnes transported recorded by the EPTMC in 2019, yielding similar conclusions when analysing flows in tonnes/km.

International developments in 2019 were similar, albeit with more moderate growth figures. Trade between Spain and other countries grew by +2.8% to 115 million tonnes, according to Eurostat data. Of this volume, 66.0% is transported by Spanish vehicles in 2019, a percentage that has increased again in 2019. France, Portugal and Germany are again the main recipients of goods transported by road. With regard to international road passenger transport, the latest available data corresponds to 2017, a year in which total flows recorded a significant upturn of +6.0%.

This brief summary cannot end without commenting **on the impact of COVID-19 on road mobility**, where provisional data reflect a significant decrease in passenger mobility (especially in collective transport) and a moderate decrease in freight transport, although comparatively less than in other modes.

Railway transport

The evolution of the rail mode in 2019 had a mixed performance, with overall positive figures for the passenger segment that do not transfer to the freight segment. While passenger transport experienced positive growth rates almost across the board (with some exceptions for certain services or operators), freight transport shows generally less positive figures.

The number of passengers recorded in 2019 was +1.4% higher than last year's figures to reach 637 million passengers. This growth was fairly homogeneous among the different services, with long-distance services growing the most (+2.7%). On the other hand, demand expressed in terms of passenger-km has similar figures (+1.4%), although somewhat less homogeneous, with medium distance services experiencing a contraction of -2.5%, compared to the increase in commuter (+1.0%) and long distance (+2.4%).

In relation to **rail freight, 2019 has seen a reduction in demand figures**. In particular, net tonnes/km fell by -7.9% while the drop in tonnes/km was smaller (-3.1%). With regard to the liberalisation of the sector, there has been a decrease in demand from all railway companies, with Renfe's smaller drop compared to private companies, a phenomenon that has led to an increase in Renfe's market share, standing at 65.4% in 2019 in terms of tonnes and 59.3% in tonnes/km.

Similarly to what has been said for road transport, the **impact of the COVID-19 pandemic is more notable in the rail mode**, where Renfe's provisional data for 2020 show a drop in demand figures for passenger services as a whole of -48% (in terms of passengers), with a smaller drop in freight demand (-16% in tonnes).

Air Transport

Air transport continued its strong performance in 2019. The number of passenger flights using the airports of the AENA network increased by +1.8%, with higher growth at the domestic level compared to the international level and similar to the evolution of seats offered (+2.0%).

Demand grew in 2019 above supply, a phenomenon that has been observed in recent years. Specifically, **passenger transport** recorded an increase of +4.0%, which was extensive to all **areas** with increases ranging from +2.5% in EU Schengen journeys, through +4.6% in other international traffic, to +6.4% in national traffic.

Meanwhile, **freight transport continued its upward trend** (+6.3% compared to 2018 figures). In this case, the highest growth rates were observed in the international sphere, where movements within the EU Schengen area increased the most (+9.0%), although the upturn observed in the rest of international relations (+7.0%) was also significant. In contrast, domestic air freight experienced a significant drop in 2019 (-9.4%).

Main Spanish airports in the AENA network experienced positive growth figures in the main variables analysed. In particular, in 2018 these airports managed more than 2 million aircraft operations (+6.3%), 274 million passengers (+5.8%) and more than one million tonnes (+10.0%). The airports of Madrid and Barcelona remain at the forefront both in terms of the volume of passengers and freight being managed, but their importance differs depending on the segment analysed.

Finally, it should be noted that the impact of COVID-19 has been particularly significant in the air mode, where the provisional figures for passengers, freight and flights managed by the Spanish airports of the AENA network during 2020 reflect very significant decreases.

Maritime transport

2019 was also positive for maritime transport, in line with figures registered for other modes. In terms of supply, **both the number of vessels (+2.3%) and GT units (+3.8%) grew in 2019,** with the growth being more intensive in passenger vessels than in cargo vessels.

Maritime passenger transport in the State Port Authorities and the dependent ports of the autonomous communities **experienced a growth in 2019 of +5.0% reaching 29,352,285 passengers.** This growth has been homogeneous for all types of traffic analysed, with the strongest growth in cabotage (+7.3%), followed by cruises (+4.5%) and ending with the slight increase in foreign transport (+0.7%).

On the other hand, **maritime freight transport again recorded a new all-time high of 526 million tonnes in 2019,** albeit with very little growth. As usual, there was a better performance of external transport (+0.2%) in contrast to the decline of the cabotage regime (-0.2%) and fishing, victualling and inland traffic (-6.6%).

On the other hand, **the ports of the State Ownership Port System managed in 2019 a total of 37.6 million passengers (+4.2%) and 564.5 million tonnes (+0.2%),** with a similar distribution for the main passenger-handling ports (Port Authorities of the Balearic Islands, Santa Cruz de Tenerife, Bay of Algeciras or Barcelona) and freight (Bay of Algeciras, Valencia and Barcelona).

In relation to the impact of COVID-19, provisional figures for the year 2020 reflect a significant drop in the main shipping magnitudes as a consequence of the pandemic.

Urban and metropolitan transport

The state and evolution of urban and metropolitan transport is analysed in detail by the **Metropolitan Mobility Observatory** (OMM), which includes the **6 main metropolitan areas of Spain** (Madrid, Barcelona, Valencia, Seville, Malaga and Asturias). In its latest edition, it presented data for 2018, a year in which overall mobility grew again.

The aggregate supply measured in seats-km of these 6 metropolitan areas **grew by +1.5%**. This increase was homogeneous, with a notable increase in intercity bus (+2.5%), followed by urban bus (+1.8%) and metro and tram (+1.0%). On the other hand, **demand grew more than supply, with an overall increase of +3.6%,** although with disparate figures when analysing the different modes and services, highlighting the increases in metro and tram (+5.4%) and intercity bus (+4.6%), as opposed to the decrease in urban bus (-0.8%).

The **INE Passenger Transport Survey** offers 2019 data for the same metropolitan transport modes in addition to others such as school and work transport. In that year there was an increase in total passenger demand of +3.3%, with the highest growth in intercity transport (+4.4%), and more specifically in intercity bus transport (+7.4%).

Modal split

If **domestic passenger transport in Spain** is analysed in **terms of its distribution between the different modes,** it can be seen that it does not vary significantly from one year to the next and only shows long-term trends. The **predominance of road** remains clear in 2019, especially that of the private car with a share of 78.0% of passenger-km, although it decreased in value compared to the previous year. The air mode maintains a higher share than rail (7.9% compared to 6.4%). In **international transport,** in 2017 (the latest year for which data is available) **air mode overtook road for the first time,** with 50.2% of the share compared to 47.5%.

In **freight transport, road transport maintains an even clearer hegemony at the national level** than in passenger transport. In 2019, 95.0% of tonnes were transported by road. In addition, the railways lost some of their share compared to the other modes, which gained share. In **international transport,** on the other hand, **maritime transport is predominant** with a 79.3% share, a figure that has decreased with respect to the previous year, to the detriment of the share of road transport.

Investment and capital

In 2019, **investment in transport infrastructure executed by the public administrations as a whole exceeded 7.2 billion current euros,** which represents a growth of +2.5% compared to the previous year's figures. This slight upturn in investment represents a new change in trend, given that, with the exception of 2017, public investment in transport infrastructure has been contracting since the beginning of the crisis.

The distribution of investments according to the different public administrations shows that the one made by the **Ministry of Transport, Mobility and Urban Agenda continues to register the greatest weight, representing 70.2% of the total for 2019 in constant terms.** A breakdown of transport modes shows that all Public Administrations as a whole have invested more in roads (49%), while if only the Ministry's investments are taken into account, the railway remains the predominant mode (44%).

Regarding the **Gross Formation of Fixed Capital of the public sector, in 2019 it reached 26,033 million euros (+0.4%),** which represents the third consecutive year of growth. However, its participation in GDP has hardly changed (2.09%), still being far from pre-crisis values (5.1% in 2009) as well as the average of the EU-15 countries (2.85%).

Value added and productivity

The Gross Value Added (GVA) of the 'Transport and Storage' sector reached a new historical maximum in 2019, both in real and nominal terms, when **experiencing a growth of +5.3%** in euros registered in 2015 **higher than the Spanish economy as a whole** (+2.0%).

If the different subsectors are analysed, the importance of both **'Land and Pipeline Transport'** and **'Storage and Related Activities'** continue to be appreciated, given that between the two of them, production figures registered 83.6% in 2018 and 86.7% of GVA.

Meanwhile, the 'Transport and Storage' sector has **continued the trend of decreasing the number of hours worked per person,** which, while still being higher than the average for the Spanish economy as a whole, stood at an additional 27 hours per year in 2019. Likewise, the trend of **convergence of the apparent productivity of labour with that of the economy as a whole** is also consolidated, with **'transport and storage' productivity exceeding that of the economy as a whole for the first time since 2004**. As usual, productivity is very different depending on the subsector analysed: if in 'Land and Pipeline Transportation' productivity continues to be low (-28.6% lower than that of the Spanish economy as a whole), the subsector of 'Storage and Annexed Activities' stands out for its high productivity, well above (+67.6%) the national average.

Employee remuneration continues on the growth path observed since 2014, rising by +7.2% in 2019, higher than the increase in gross operating surplus and mixed income (+5.5%). However, despite this decrease, if the 2008- 2019 period is analysed, it can be seen that while the operating surplus is +46.9% higher than in 2008, the remuneration of employees is barely +8.3% higher. Likewise, the proportion that represents the remuneration of employees in the 'Transportation and Storage' sector (52.1%) is slightly higher than that of the economy as a whole (50.6%).

Employment

According to the data provided by the Active Population Survey, **2019 is the sixth consecutive year with employment growth in the 'Transportation and Storage' sector, registering a growth rate of +5.1%,** higher than that experienced by the whole of the Spanish economy (+2.3%). This growth was homogeneous across all subsectors, with the exception of maritime and inland waterway transport. An analysis of the two main subsectors shows that 'Land and Pipeline Transportation' brings together 60.0% of those employed in the sector and experienced a growth of +4.9% in 2019, while on the other hand, 'Storage and Annexed Activities' increased its year-on-year rate (+0.9%), although its weight over the total number of employees in the sector is significantly lower (21.4%).

On the other hand, the **total Social Security affiliates in the 'Transportation and Storage' sector in 2019 was 959,052, +4.4% than the previous year.** It should be noted that, despite the growth in the number of self-employed workers in 2019, the quota continues to decrease for the sixth consecutive year, standing at 21.1% of the sector without taking into account postal activities.

Regarding the quality of employment, in the **transport sector wages are, in general, higher than the average in the services sector and in economy. The same goes for productivity, which has increased considerably in recent years**. However, this is not homogeneous in all subsectors, since 'Land and Pipeline Transportation' continues to have low salaries and medium productivity. On the other hand, the net labour cost per employee in the sector experienced a slight rebound in 2019 of +2.4%, standing at 32,591 euros.

Prices and costs

The **oil price**, taking Brent crude as a benchmark, recorded a decline of -8.6% in 2019 and represents a reversal of the increase, with its oscillations, that had been observed since 2016. This oil price behaviour, which looks set to consolidate in 2020 as a result of lower demand due to the COVID-19 global health crisis, is likely to be passed on to transport prices with some time lag. In this case, a **deceleration in the price of transport** is observed in 2019, **with a growth of +1.1%** (lower than in previous years), while the **price index for transport services continues its trend of stability and containment** in prices, with a variation of -0.1%.

In 2019, **the average expenditure per person in transportation grew above the average expenditure per person** (+2.4% against +1.1%). However, the percentage of transportation spending remains below pre-crisis levels (12.9% against 14.8%), suggesting a change in consumer preferences.

The **prices and transport costs analysed show similar behaviours in 2019**. In terms of road transport, the cost of private vehicle transport grew by +0.8% in 2019, while the cost of collective road passenger transport grew by +0.2% (on average for all vehicles in 2020) and the cost of road freight transport grew by +0.7% (on average for all vehicles analysed in 2019).

Rail transport performance was similar to that of previous years, with the *consolidation of medium-distance high-speed services as the most popular on average at national level* standing out. In relation to income, in 2019 there was an increase of +4.0% compared to the previous year driven by both growth in demand as well as growth in some average perceptions. As far as the **freight segment** is concerned, a mixed performance was observed, where the average revenue per tonne-kilometre of public operators decreased by -1.6%, in contrast to the rebound of the average revenue per tonne (+4.2%). These figures lead to a decrease in total revenues of -2.7%, partly as a result of the decline in demand from these operators.

In relation to **air transport**, the 2018 revenue figures reflect a higher share of revenue from scheduled services in total revenue, reaching a contribution of more than 80% for the main airlines analysed.

With regard to **maritime passenger transport, the revenue per passenger-km increased significantly in 2019 (+9.0%).** This, combined with higher demand, has resulted in an estimated increase in revenue of +14.9%.

Market and business structure

The variables analysed **(value added, production, number of companies and number of people employed) in the 'transport and storage' sector performed better in Spain in 2018 than in the main European economies**. Specifically, Spain recorded higher growth in output (+0.1%) and number of persons employed (+3.3%).

In relation to the two main subsectors, **'Land and Pipeline Transport' still registers low productivity compared to that registered in the 4 main European economies.** Specifically, in 2018, Spain still has many more companies than other countries, doubling the average number of entities that operate in those countries, to which we must add the low production value (46% of the G4 average) and employment (70% of the G4 average). One of the possible causes of this situation may be the existence of a large number of small businesses.

The subsector of **'Storage and Annexed Activities'** is characterised by production and employment values of only 45% and 51%, respectively, of the average of the G4 countries, while the number of companies record values similar to the weighted average of the main European economies in 2017.

Regarding the size of the companies of the subsectors in Spain, almost all of them in both subsectors are very small. Specifically, in 2018, in 'Land and Pipeline Transportation' 95.3% were companies with less than 10 employees, and in 'Storage and Annex Activities' they were 83.2%.

A specific analysis by activities shows the importance of **the weight of the production value of the 'Transport of freight by road and removals' that, in 2018, reached 29%** of total production of 'Transport and storage'. Once again, **orientation towards smaller vehicles** and a **slight ageing of the fleet** is observed.

Financing

In 2019, the **indebtedness of the 'Transportation and Storage' sector increased for the third consecutive year,** reaching 34,007 million euros (+0.1% compared to the previous year), in contrast to the decrease in indebtedness recorded for the economy as a whole (-2.0%).

Non-performing loans continued their progressive decline in all sectors. In particular, the **transport sector showed one of the lowest figures ever presented, standing at 4.4% in 2019.**

Research, Development and Innovation

2019 was another positive year for R&D spending (+3.8%) incurred by businesses in the 'Transportation and Storage' sector. This growth in spending has been accompanied by an increase in the number of companies and personnel dedicated to these types of activities.

Spending on innovative activities other than internal R&D in Spanish companies as a whole grew by +3.8% in 2019. This strong performance of **spending on innovative activities is even stronger in the 'transport and storage' sector,** where a spectacular rebound of **+27.0%**was recorded **in 2019**.

Internationalisation

In terms of **trade balance**, in **2019 the goods trade balance experienced a decrease in its negative balance** due to the higher growth of exports (+1.7% compared to the previous year) compared to imports (+0.8%), breaking the trend of higher import growth of the last two years.

The investment position of Spanish companies abroad recorded a significant decrease of -12.5% in 2018, reaching 18.1 billion euros. This decline, although of a lesser magnitude, is also observed in **the investment position of foreign companies in Spain** with a fall in 2018 of -4.8% compared to the previous year, reaching 16.4 billion euros.

Finally, **foreign trade** showed some disparity in its figures in 2019. While physical units recorded a slight decline of -0.8%, due to a decline in imports (-2.1%) which did not offset the modest growth in exports (+0.9%), in monetary units, a growth of +1.4% was recorded in 2019, with increases in the value of exports (+2.0%) exceeding that of imports (+0.9%). Consequently, this improved performance of the monetary units has led to an **increase in the average value of the commodity, which reached a new all-time high of 1,381 euros/tonne in 2019**.

Security

Firstly, with regard to **road transport safety,** in 2019 the **number of accidents with casualties** increased by +3.4% compared to the previous year. This distribution has been fairly homogeneous in percentage terms, with the interurban area experiencing an increase in the number of accidents (+3.1%), a slightly lower rise than that observed in the urban area (+3.6%).

On the other hand, in 2019 **the number of fatalities decreased (-2.8%).** This decline is based on the significant contraction in the interurban sphere (-6.2%), which contrasts with the rebound observed in the urban sphere (+6.1%).

A specific analysis of the interurban area as regards mobility shows a reduction in accidents and fatalities through danger and mortality rates. Specifically, the decrease in the mortality rate (MR) was -6.8%, and the danger index (DI) was -2.2%, which supports the **good performance of road safety in 2019 despite the increase in the amount of vehicles circulating on Spanish roads.**

With regard to **railway safety, 2019 is affected by the accident** that occurred on 8 February 2019 in the town **of Castellgalí** (Barcelona), where the collision between two trains caused the death of one person and 19 serious injuries. This unfortunate event affects the analysis of the number of seriously injured (+76.5%), but not so much the number of fatalities, where there is also a strong increase (+37.5%) in 2019.

The number of accidents was more stable in 2019, with increases in both total accidents (+4.9%) and significant accidents (+4.3%). This increase in the number of victims and accidents is reflected in the indicators (both accident and risk), which have increased in all cases, with the notable exception of the level crossing risk indicator, which reached the lowest level of the period analysed in 2019.

Regarding **air safety,** in **2019 there was an increase in the majority of the variables analysed**. In particular, the number of accidents increased by +54.2%, the number of incidents remained constant, the number of fatalities increased by +125.0%, while the good news was the decrease in the number of serious injuries (-40.0%). However, it should be pointed out that **given the reduced accident and incident rate in this mode of transport,** the fact that there is an increase in one unit can lead to significant percentage variations, such as those previously expressed.

In the area of **maritime safety,** in 2019 **the number of emergencies increased** in the Spanish SAR zone to a total of 6,576 (+4.5%), reaching the historical maximum of the series. This increase is despite the **decrease in the number of boats handled,** which is reflected in a decrease in the number of fatalities and missing persons. The number of fatalities stood at 128 people, to which must be added the 135 missing persons, -49.6% and -31.5% lower than in 2018, respectively.

Environmental sustainability

Energy consumption in transport in Spain in 2018 grew by +2.5%, with road transport accounting for more than 92% of final energy consumption as a result of **its greater share of passenger and freight transport.** For comparative purposes, Spain continues to be above the EU-28 average.

Rail transport remains the most energy efficient in terms of final energy, due to the high number of passengers and volume of freight that can be transported on each trip. On the other hand, air transport shows the lowest efficiency. Also, rail transport **produces less direct emissions of GHG and other pollutants** because it uses electricity as its main source. The change in trend in the dieselisation of the vehicle fleet in the last decade should be noted in road transport, where the consumption of conventional fuels is beginning to undergo a major change. The use of **renewable energy in transport increased from 1% in 2014 to almost 7% in 2018.**

With respect to pollutant emissions from transport, the share of transport emissions in 2018 increased by almost 8 basis points (from 26.7% in 2017 to 27.5% in 2018), while in the rest of the European Union the share also increased by 5 basis points (from 22.4% in 2017 to 22.9% in 2018). This growth confirms the trend observed since 2016, since from 2007 to 2015, the weight of GHG emissions produced in transportation was reduced. In general, in all types of pollutants (GHG, acidifiers, etc.), road transport registers the highest amount of emissions because, as mentioned above, it is the mode with the highest modal share in domestic passenger and freight transport.

It should be noted that rail transport continues to have a clear advantage in terms of direct GHG emissions per transport unit/km, whereas, in contrast, air transport produces more GHG emissions for each passenger/-km and tonne/kilometre transported.

Logistics

In 2019, the **economic weight of the logistics sector** represented 2.9% of the GDP of the Spanish economy, maintaining **levels similar** to the previous year and similar to the weight of the main European economies. Regarding employment, the sector obtained a growth of +3.2% in the number of employed persons, which places the sector with a weight of 3.4% in the economy, which is also similar to the share of logistics in the employment of the main European economies. This growth is based on higher employment rates in the 'Freight transport by road and moving services' (which represents more than 50% of the workers).

A stable trend continues in areas associated with logistic nodes, showing hardly any changes, reaching 78.9 million m^2 in 2019. These areas are **mainly linked to maritime transport** (47.7% share) and **road transport facilities** (40.3%). Regarding logistic intensity (m^2 logistics facilities/€ of GDP per capita), similar values to those of 2018 are observed.

In addition, the railway sector shows a trend towards flexible solutions in terminal management, which has been confirmed in the last three years.

With regard to **freight transport**, the growth that began in 2014 continued to be observed in 2019, with an overall increase of **+4.2**%, similar to the figure recorded a year earlier. **All areas (both national and international) recorded positive growth rates**, while the modal analysis shows a more disparate behaviour, highlighting the good performance of road transport with increases in both areas, which contrasts with those produced only for the international area in the rail, air and maritime modes. This improved performance of road transport has reinforced its predominant position in national transport, with a share of 95.2% in tonnes, and improved its position in international transport, where the maritime mode continues to be the majority (79.3%).

Finally, **multimodal transport** experienced a slight increase of +0.3% in 2019, which was lower than that recorded by unimodal chains (+5.4%). On the other hand, with regard to **intermodal transport**, in 2019 there was a decrease of -1.2%, which breaks the upward trend that had been observed since 2013.