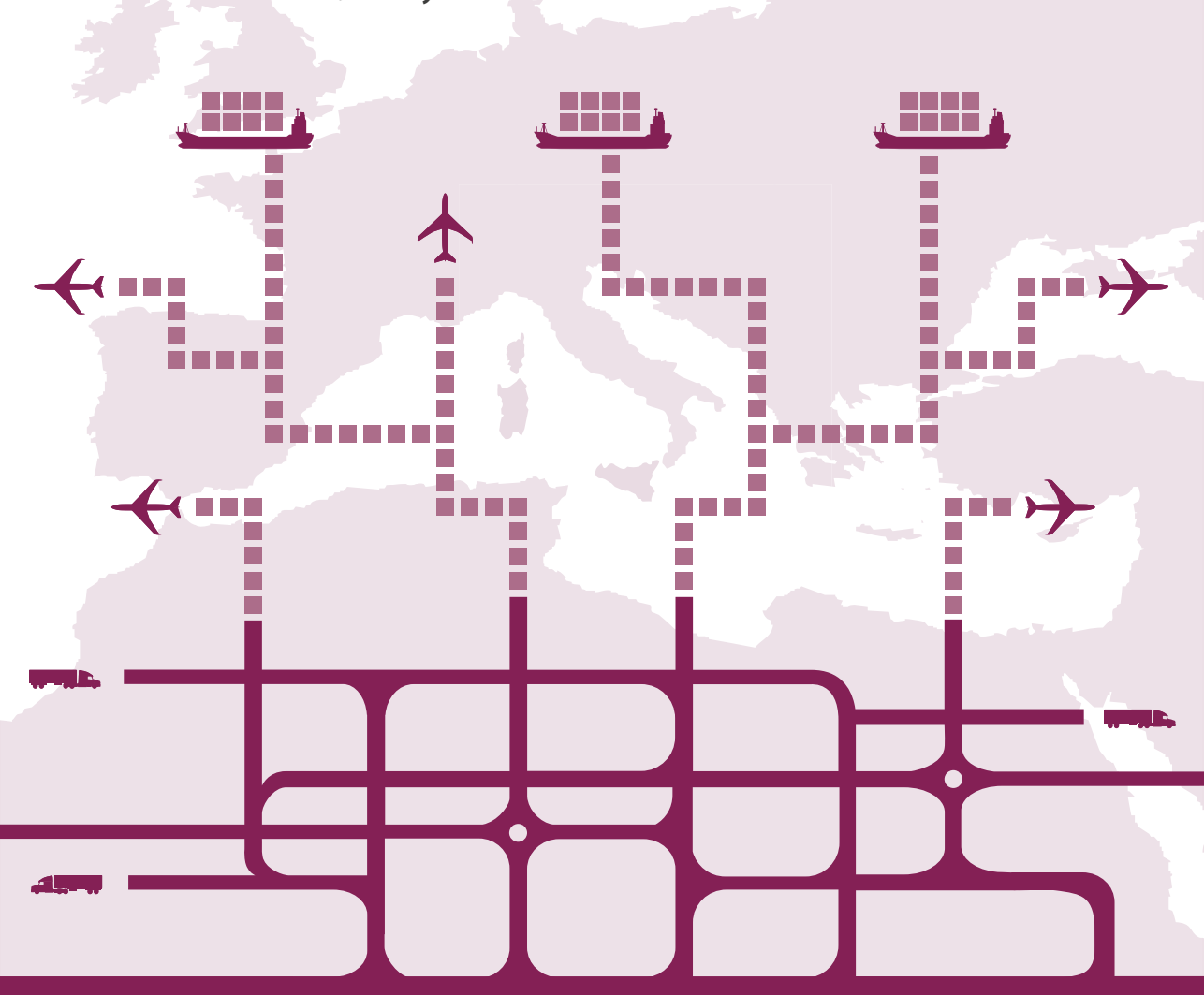


# ITALIAN LOGISTICS SYSTEM: IMPACT ON THE ECONOMIC DEVELOPMENT

Scenarios, analysis of infrastructures and case studies





**ITALIAN LOGISTICS SYSTEM:  
IMPACT ON THE ECONOMIC DEVELOPMENT**

Scenarios, analysis of infrastructures and case studies

*Rubbettino*

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#### NOTES:

While the overall design of this paper is the care and responsibility of SRM, the authors of the individual chapters and case studies are specified below:

- Chapters from I to IV, and Case Study 4 (Chapter V) by SRM;
- Case Study 1 (Chapter V) by Lanfranco SENN and Clementina PERSICO;
- Case Study 2 (Chapter V) by Ennio FORTE;
- Case Study 3 (Chapter V) by Enrico BERETTA, Alessandra DALLE VACCHE, Andrea MIGLIARDI;
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See page 177 for further details.

All the interviews, the final drafts of which have been approved by the interviewees, were carried out by SRM, which can in no way be held responsible for the facts, opinions, news, and data contained in the interviews.

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*To those who with ideas,  
works and actions contribute to  
the social and economic development  
of Southern Italy, through a  
European and Mediterranean vision*



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\* The chapter contains the summaries of the case studies. They are available in complete form in the Italian version of the paper at [www.srm-maritimeconomy.com](http://www.srm-maritimeconomy.com).



## PREFACE

*Logistics has always been one of SRM's research topics; we firmly believe that if a country wants to "stay and compete in Europe" it must guarantee its enterprises, and the internationalisation process of its economy, a top-level system of infrastructures and services. In the economic gap separating Italy from other nations, with Germany at the fore, logistics often plays a key role, together with the entire chain it represents: shipping, shipping companies, maritime agencies, sorting and handling services, warehousing, and much more. Today, in order to stay on the markets, businesses need all this, and the processes involved must be swift, efficient, and effective.*

*Effective logistics management means being aware of the evolution of the markets, of which goods hold appeal, and which industrial players are seeking new horizons for growth.*

*Italy is continuously called to meet new challenges on the fronts of trade, the economy, and production, not least among them the challenges posed by the countries of the Mediterranean Basin, with North Africa at the fore. Italy's import-export trade with the Med Area takes place by sea, by air, and via intermodal transport, and is worth over 65 billion euros; total Italian foreign trade is worth over 750 billion euros, of which 240 billion travels by sea. These figures show how important it is to have a sound logistics setup in place.*

*In this paper, the concept of an "efficient logistics system" is referred to; this means being endowed with competitive infrastructures, and in our specific case first of all with ports and interports; it means becoming aware of the need to develop intermodal transport mechanisms. On this front, Italy still has a lot of work to do, as confirmed by the data provided with our analysis.*

*One important indicator is the World Bank's Logistics Performance Index, based on which Italy ranks 24<sup>th</sup> in the world: Germany ranks 4<sup>th</sup>, Holland 5<sup>th</sup>, Belgium 7<sup>th</sup>, and Spain 20<sup>th</sup>. Mention of these nations naturally brings to mind major port facilities such as Hamburg, Rotterdam, Antwerp, Valencia, which are gradually and ominously (for Italy) stepping up their market penetration strategies, supported by the active policies put in place by their respective national governments.*

*Italy, and above all Southern Italy (the "Mezzogiorno"), is well-equipped to take on this challenge; it has top-notch ports and interports, and businesses that are increasingly affirming themselves on the territory; but this is not enough. Growth-supportive policies and the development of a system of rules are needed, capable of acting incisively on the sector, making it truly strategic for the country, and providing serious impulse to the creation of a full-fledged logistics "system".*

*This paper takes on this topic in the broadest terms possible, and analyses Italy's logistics, entrepreneurial, and infrastructural assets. I would also like to highlight in particular the importance of one section of the paper that relays the "voice of the territory", through targeted interviews with industry protagonists: institutions and trade organisations, companies and infrastructures, also located abroad, and I would like to take the opportunity here to thank the people and organisations involved for their help and collaboration.*

*One of SRM's research methodologies is to listen directly to the voice of the protagonists of our papers. In our view, it is only by discussing and dissecting the issues analysed with the people who deal with them everyday, that an accurate picture may be obtained of the factors that can help foster development in the territory.*

*This paper delves into the topic providing a wealth of data, statistics, and extensive and varied references. Therefore, I hope you will draw useful information and benefit from reading this work, intended as a further contribution from SRM to support lasting, healthy, and tangible growth in Italy.*

Paolo SCUDIERI  
SRM President

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SRM draws an extensive and detailed picture of Italy's logistics endowment, highlighting its strengths and weaknesses, its risks and opportunities. The logistics chain is a complex and multifaceted one: it encompasses both manufacturing companies which aim to internationalise, or to ship and process their goods, and business sectors such as land and maritime shipping, as well as rail transport, which face macro and micro issues of invariably great importance that need to be solved as soon as possible. Therefore, this paper identifies the most important obstacles that are holding back the sector, examines possible strategies to relaunch investments in infrastructure, outlines potential growth horizons in terms of promising countries and territories, and stigmatises errors which must not be repeated in future cohesion policies.

This analysis leads to the definition of four "pillars" for the development of logistics, capable of representing a solid and necessary platform from which to boost the sector's takeoff in Italy, and allow it to successfully meet the new commercial, economic, and productive challenges, starting with those posed by the countries of the Mediterranean Basin.

On this front, in order to provide a detailed picture of the international logistics panorama, as well as carrying out an on-field survey addressed to the major Italian players, SRM has interviewed companies and leading infrastructures abroad, and drawn up a focus paper on Italian enterprises that have invested in the Med Area and in North Africa in particular.

Therefore, this research addresses logistics not as a sector closed in on itself, but as a reality capable of affording Italy the international vocation its economy has a strong need for, especially given the current historical phase, in which exports seem to be the only lifeline available.

## SRM

Research centre based in Naples, specialised in the analysis of regional economic trends, with particular focus on Southern Italy (the "Mezzogiorno"), on the economic dynamics pertaining to relations between Italy and the Mediterranean, and on national and international maritime transport. SRM, born as an intellectual and scientific institution, aims to create added value in the social and economic tapestry, by leveraging improved knowledge.

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