

Global Shipping Think Tank Alliance, 4th plenary meeting

Corridors and logistical efficiency of territories

The results of a “survey” on Italian manufacturing companies

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Hong Kong, 21st May 2019

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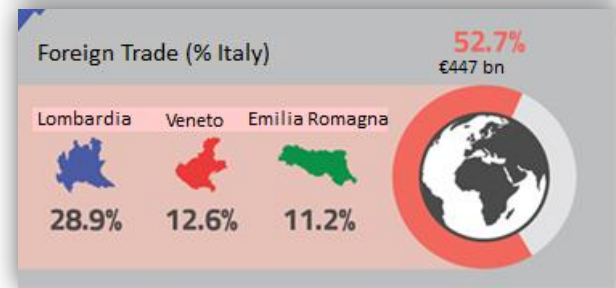
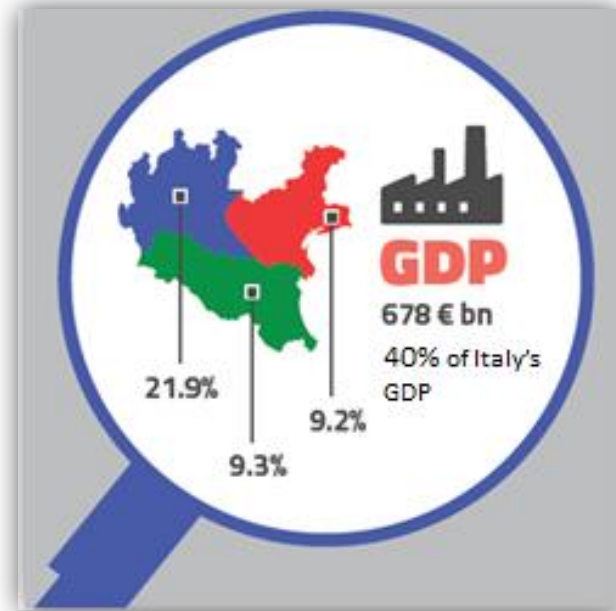
Corridors and logistical efficiency of territories
The results of a survey on Italian manufacturing companies

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- II Logistics corridors
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- IV Quality Logistics Italian Index (QLI²)
- V Conclusion

A sample of 52.7% of Italy's trade and 40% of Italy's GDP



Source:
SRM/Contship

Methodology and objectives

Methodology

- **400 manufacturing companies** surveyed localised in Lombardia (150), Veneto (150) and Emilia Romagna (100). They export/import goods via **maritime transport** using containers.
- This part of Italy makes up **50%** of Italy's trade. **31%** of their trade uses maritime transport (37% for Italy as a whole).

Objectives

- 1) Understand main **Logistical corridors** for Italy (ports, countries and mode of transports involved in import and export);
- 2) Analyse Management of the **logistical process** (outsourcing; INCOTERMS)
- 3) Monitor efficiency and quality of the Italian Logistics System through the **Quality Logistics Italian Index** (QLI²).

Authors: the study has been conducted by **SRM** in partnership with **Contship Italia**.

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I Methodology

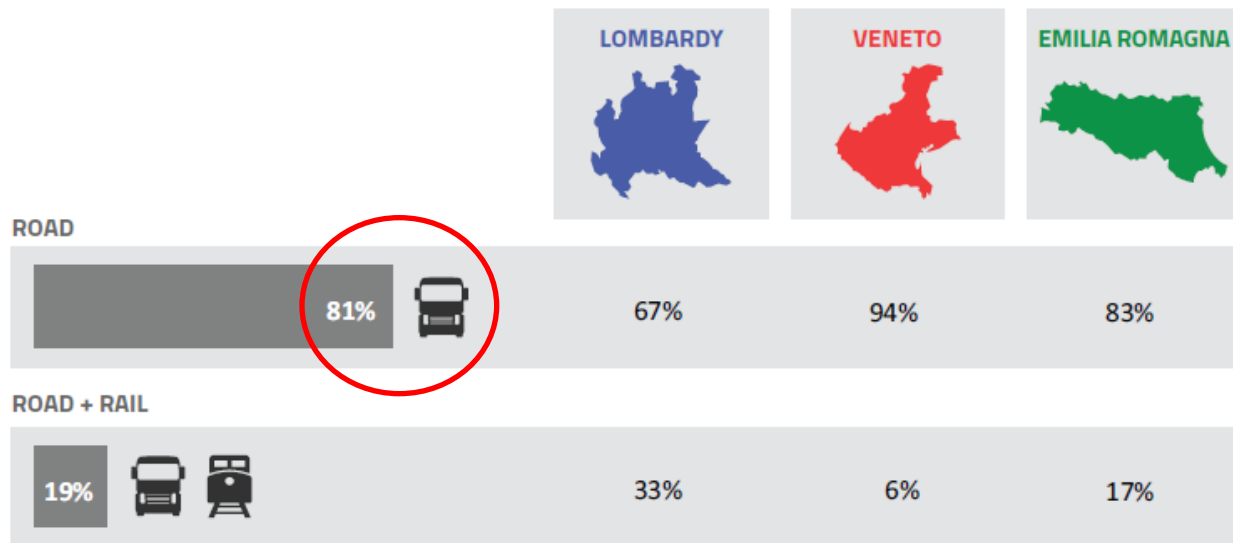
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From companies to ports: Intermodality still low

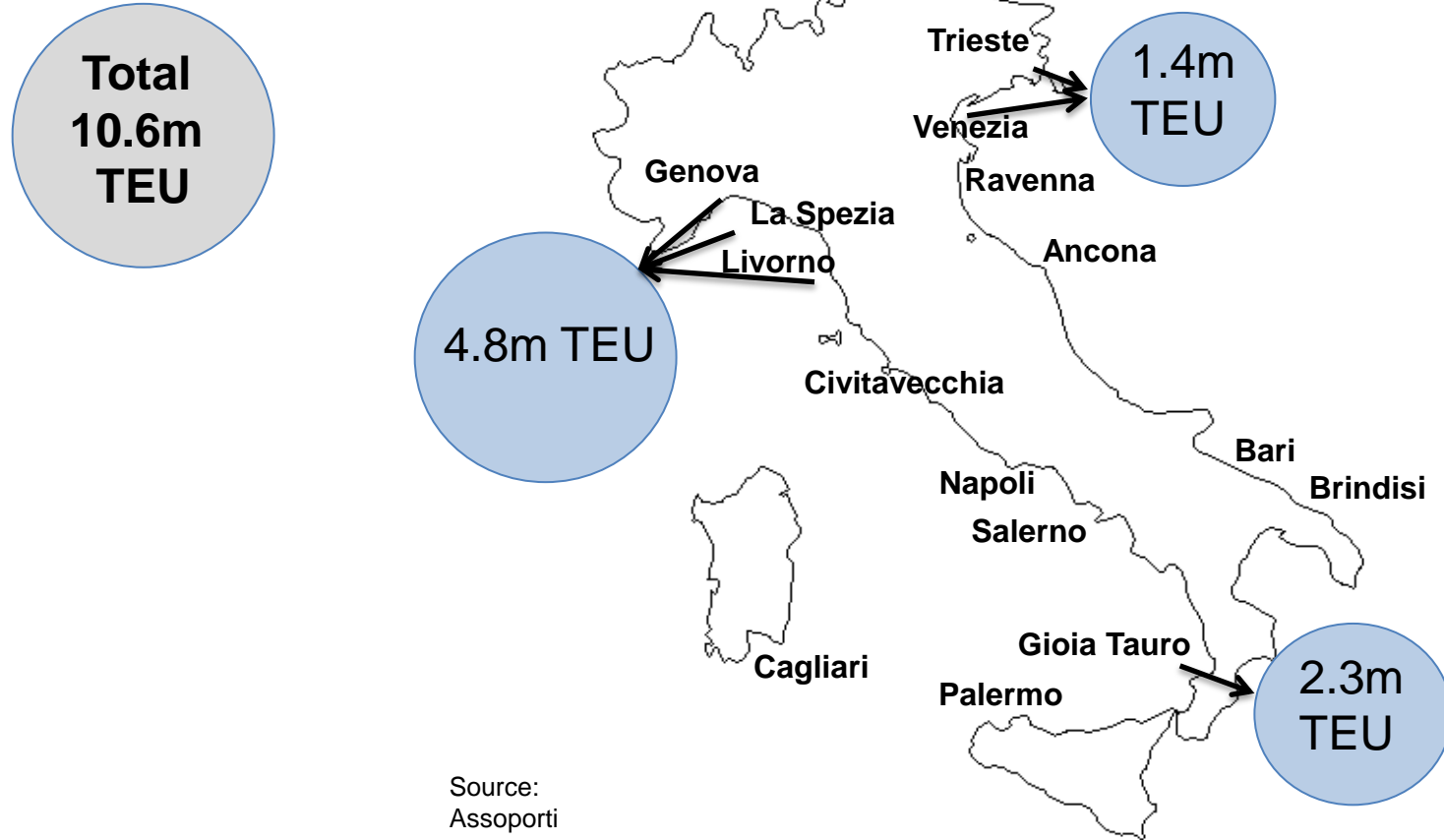


Source:
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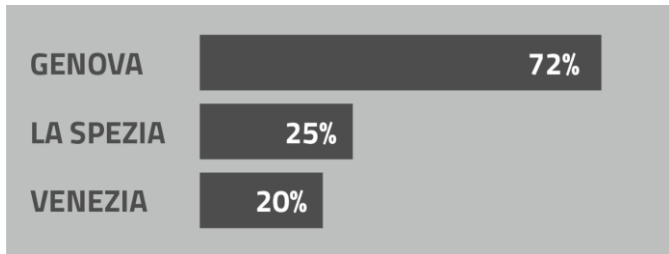
- **81%** of companies use only road to transport goods from companies to the port and viceversa. Just 19% use also trains.
- Different data for each region, but everywhere low.

The Italian port system

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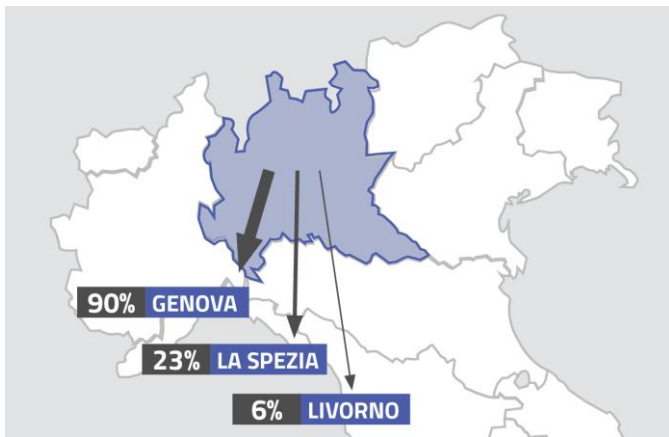
North West ports are the main entry to international markets: EXPORT



■ **72%** of companies say **Genova** is among their 2 top choices when exporting goods. The port of La Spezia and Venezia follow.

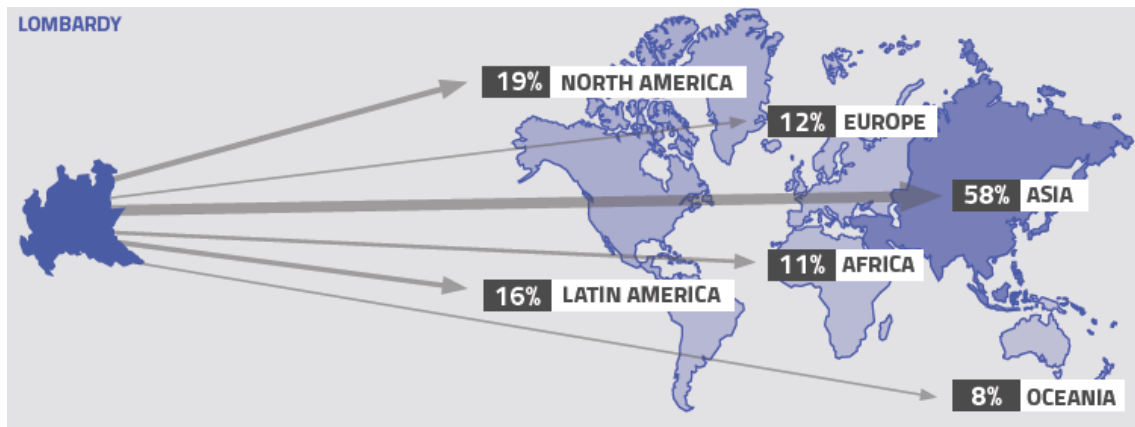
■ These three port together make up **4.7m TEU (44%** of Italy's) and are on the growth (+14%, +16% and +1%)

■ Genova is even **90%** for companies localised in Lombardia.



Source:
SRM/Contship

Asia: among the 2 top destination for Lombardia



Source:
SRM/Contship

- **58%** of companies in Lombardia confirm **Asia** among 2 top destinations for their exports. 19% say North America.

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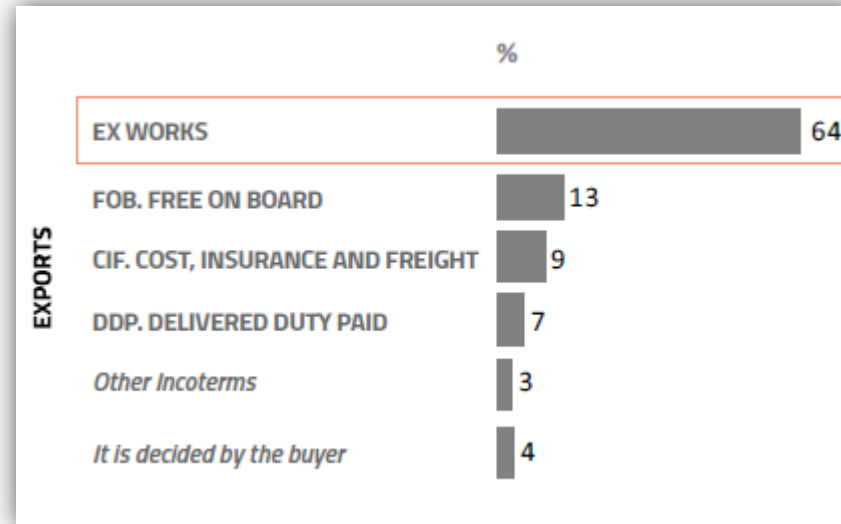
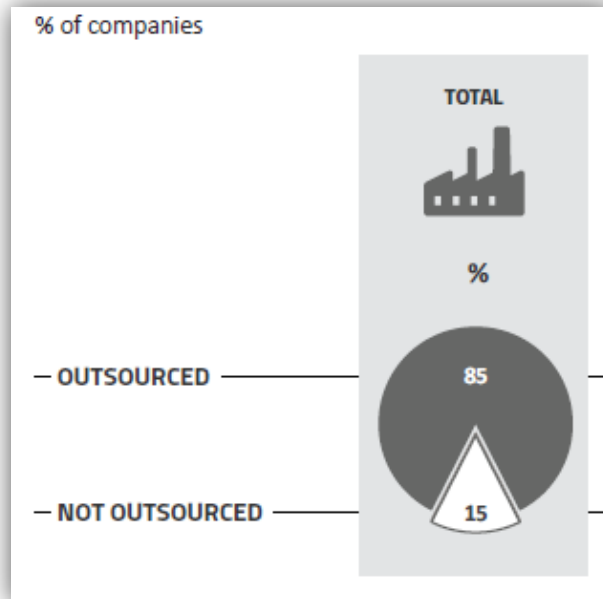
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85% outsource the logistics process. 64% sell by using Ex-work INCOTERM

- **More than 80%** give the logistics process in outsource. Is it the right strategy? Future challanges (economic and environmental) requires more **integration** in the whole supply chain. Can **digitalization** help?



Source:
SRM/Contship

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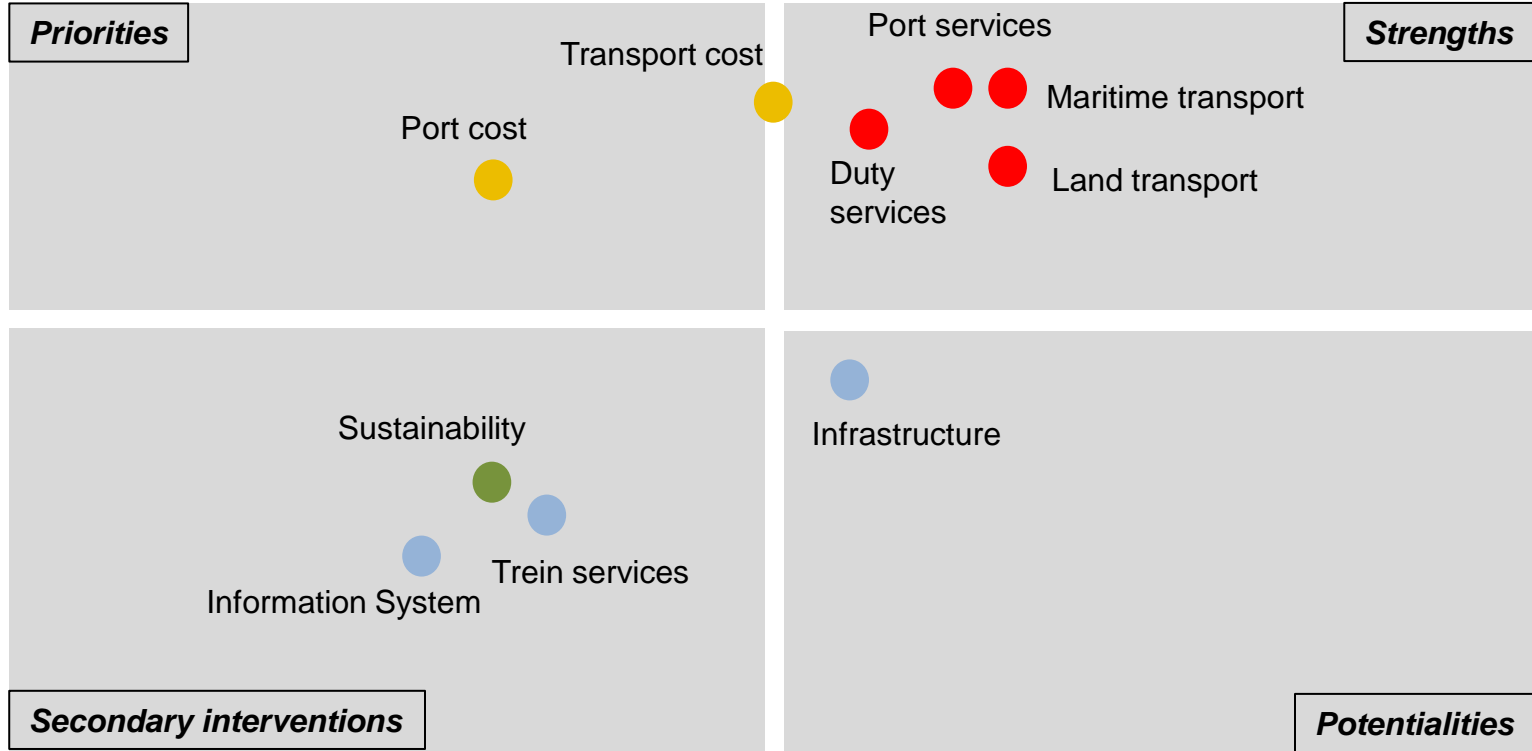
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QLI^2: Strenght Priority Analysis

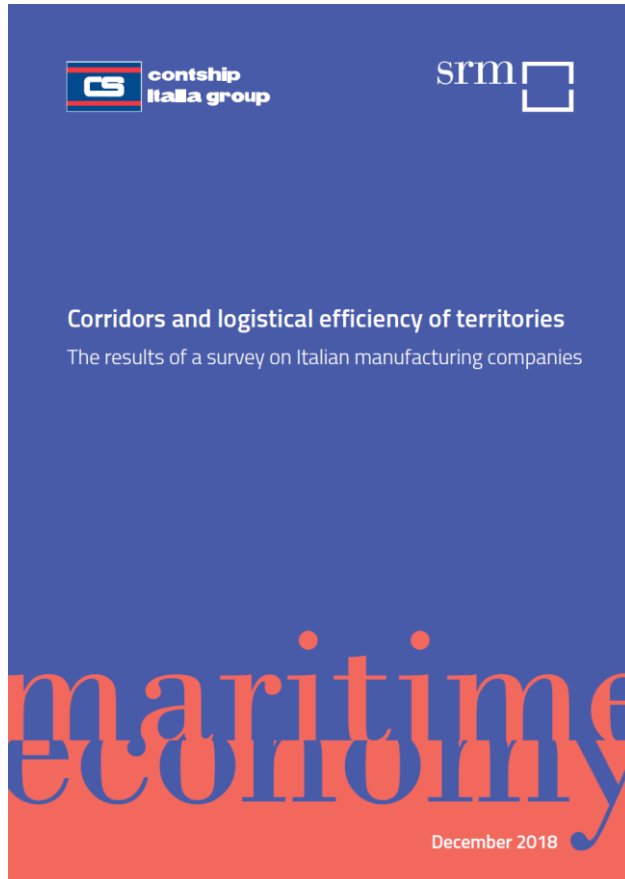
Importance
Top 2 boxes



Source:
SRM/Contship

Satisfaction
Top 3 boxes

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Conclusions:

Efficiency, competitiveness and sustainability

- SRM/Contship Survey is a partnership between companies and research. A permanent observatory on the Italian Logistics System.
- **400** manufacturing companies surveyed with a sound but flexible methodology.
- **New data and information** on logistics corridors, logistics process and companies mood on the quality of the Italian logistics system.
- A point of reference for increasing the **efficiency** and **sustainability** of the logistics system. This study is for national and international institutions, companies, and other organizations.



Thank you for your attention

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