Corridors and logistical efficiency of territories

The role of sustainability and district tradition
in enhancing the value of Italian manufacturing

maritime economy

2020 Edition

Logistics as a value and not just as a simple cost

About 18 months ago, SRM partnered with the Contship Italia group to launch a survey on the perception of the efficiency of the logistics corridors used for the import and export of products by sea, involving over 400 manufacturing companies.

From the very beginning, the intention was to conduct an analysis that could, year after year, turn into a real observatory, able to summarize in a clear and intuitive way the trend of some significant variables.

This exercise has led to the construction of the QLI2 (*Quality Logistics Italian Index*), an index based on the deviations between efficiency and perceived importance of 10 strategic parameters (which have increased to 12 with the current edition). Being able to introduce the second edition of this study is a source of great pride for Contship Italia. We thank all those who, by patiently answering the questions, have contributed to the development of this survey.

Compared to the previous edition, the SRM and Contship working group has decided to introduce some new features, resulting from the contributions collected during the two focus groups organised in May 2019. Our sincere thanks are therefore also due to all those who have put forward ideas for improvement, stimulation and integration in a critical and constructive spirit.

Today, more than ever, the issue of the efficiency of logistics corridors is a sensitive subject. The infrastructure system has shown a worrying fragility, which requires immediate intervention, but above all a change of strategic direction. The world of containerised shipping, on the other hand, is still struggling to find a balance between supply and demand; the pressure on freight rates is a clear signal in this respect.

New dynamics make the context difficult to interpret, also by virtue of the strategies of international carriers, increasingly oriented to vertically integrate their service offer. It is not easy to imagine how the brokerage system, made up of historic shipping houses and international NVOCCs, will respond to these changes. In all this, manufacturing companies, even those with products with a strong Italian characterization, continue to sell Ex Works, trying to maintain the competitiveness of their products, but risking in many cases to neglect the control levers on the distribution channels. The interpretation of the reality that surrounds us appears more and more complex; that's why we are confident that any map and numerical support able to reduce some fog is still an appreciable and positive effort.

This is the thought that has guided the whole team during the construction of this study. Enjoy your reading.

Daniele Testi
Marketing and Corporate
Communication Director
Contship Italia Group

What's new in Survey 2019

The survey, now in its second edition, is based on interviews with over 400 manufacturing companies located in Lombardy, Veneto and Emilia Romagna, which export and/or import goods by sea using containers.

The underlying objective remained the identification and monitoring of the logistical corridors used by Italian industries and their main logistical needs, with the aim of contributing over time to make the logistics system more efficient; but this year the survey also wanted to innovate some of its contents, introducing an in-depth analysis of sustainability, a very topical issue, and a specific analysis of companies in the prosecco district of Conegliano Valdobbiadene in the Veneto region, one of the highest performing in Italy, as shown by the surveys on districts conducted by the Intesa Sanpaolo's Research Department.

There's also more than just scientific news: this second edition of the publication has given value to the voices of the main actors of the sector. In early 2019, SRM and Contship, with the organisational support of Intesa Sanpaolo, identified and brought together a technical focus group made up of shippers, freight forwarders, logistics operators and researchers in order to collect reflections and ideas, useful for refining the survey. This phase has allowed us to provide further interpretative keys of the phenomena analysed, deepened in a specific analysis box.

The working group has also made a new strategic choice: to re-modulate the sample from a sectorial point of view, increasing the representativeness – in terms of number of compa-nies – of the chemical-pharmaceutical industry, considered to be of particular economic interest, at this moment in Italy's history. This change has, in part, influenced some results, such as the study of the markets of destination and origin of the goods, where the basic trends, while remaining reliable, are naturally influenced by the greater propensity of the pharmaceutical sector to invest in European markets.

Sustainability is another aspect which requires particular attention. A specific section dedicated to the topic has therefore been added, in order to understand how much importance manufacturing companies give to this driver, how strategic they consider it, what their opinion is on the demand for sustainability from consumers and end users and what are the main actions taken on this issue. Finally, a focus dedicated to specific production clusters has been adopted - on an experimental basis. We have therefore chosen to start with the Case Study on the Prosecco district of Conegliano Valdobbiadene in Veneto, one of the most important in terms of growth and potential for Italian exports of high-quality products.

SRM and Contship will continue to develop a product that can provide strategic guidance for operators and support policy makers, with the aim of demonstrating how logistics and maritime and intermodal transport can be crucial factors for the economic development of our country and any other country in the world.

Alessandro Panaro
Head of Maritime &
Energy Department
SRM

Hot topics

Objective: competitiveness of ports and quality of logistics corridors

The Ex Works issue

How and why we outsource logistics
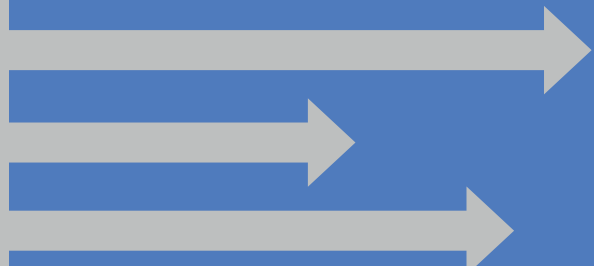
The role of sustainability today and tomorrow

The importance of enhancing the territory

In this issue

Visual Preview

A look into the main results

GDP

703 € bn

40,7% of Italy's GDP

22.2%

9.1%

9.4%
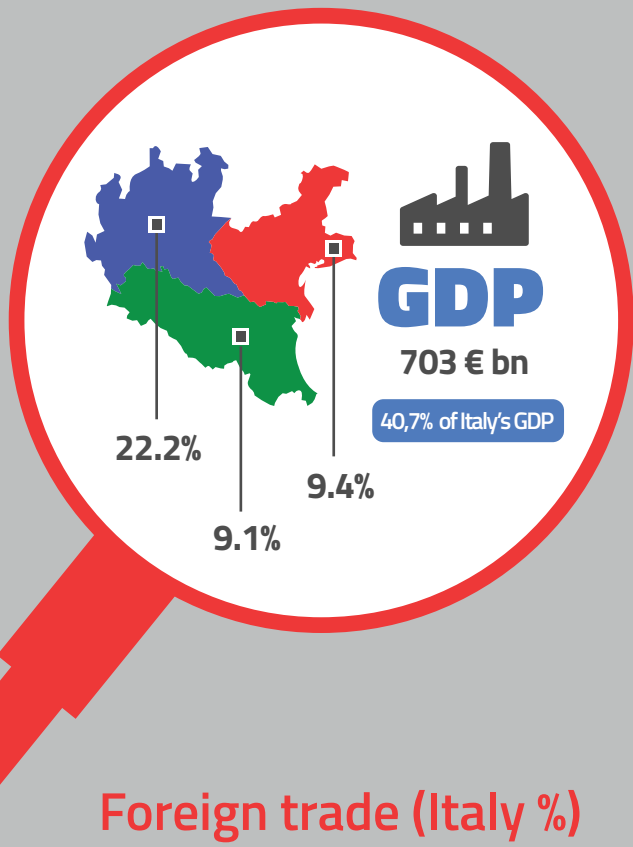
The 2019 Survey

The analysis comprised 400 manufacturing companies located in three regions, **Lombardy (150)**, **Veneto (150)**, and **Emilia Romagna (100)**, without limits in size and without sectoral constraints; the only filter is the selection of companies that export/import goods via maritime transport using containers. The interviews were conducted in July 2019.

Foreign trade (Italy %)

53.2%

473 € bn

LOMBARDY	VENETO	EMILIA ROMAGNA
29.4%	12.6%	11.3%
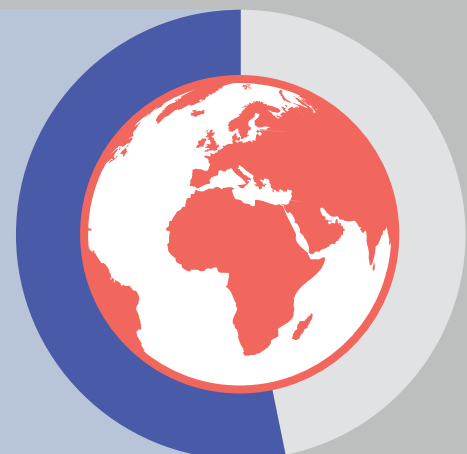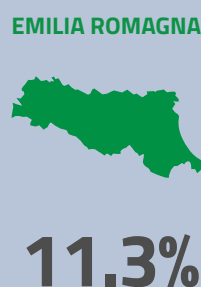
Intensity of the use of containers

92%

1 container per week
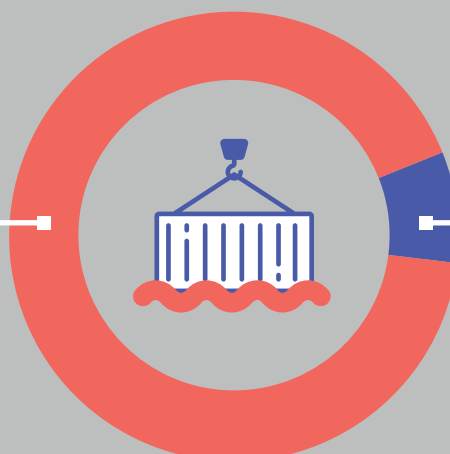
8%

More than 1 container per week

The road is the main mode of connection between companies and ports

Let's consider the "dynamic"

Genoa is in the lead. La Spezia is second, a strong benchmark for industry

Use of ports for export (% companies)

GENOA

72%

80%

⬆

LA SPEZIA

25%

25%

➖
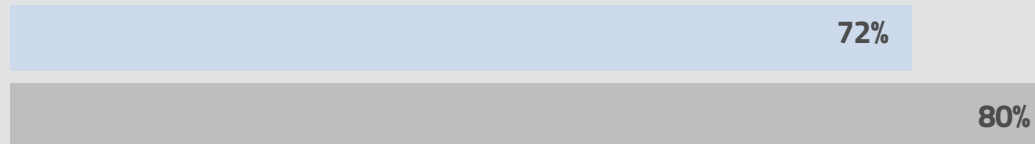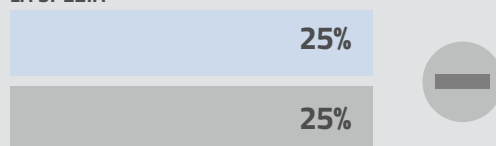
Intermodal still low

% of companies that prefer sea-rail-road to sea-road
in the transport of goods from the port to the company and vice versa

INTERMODAL

19%

17%

⬇

■ 2018

■ 2019
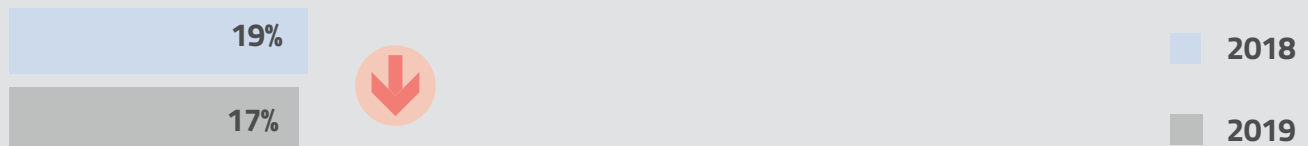
The clause Ex Works still preferred

% of companies using Ex Works in export

64%

67%

⬆
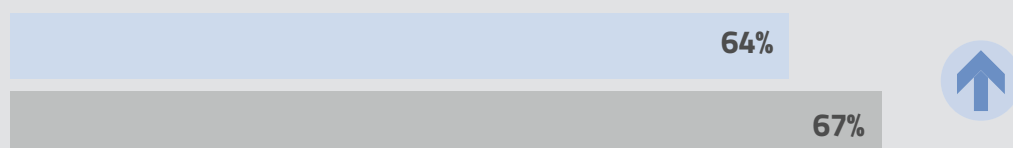
The Quality Logistics Italian Index has grown

QLI²

7.38

7.59

⬆
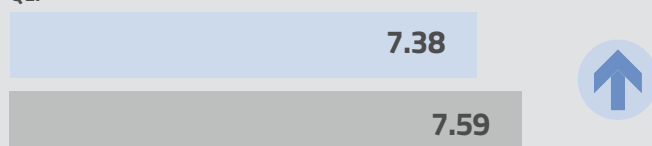
LOGISTICS CORRIDORS / departure ports

GENOA	80%
LA SPEZIA	25%
VENICE	19%

% of companies that declare to use the port to **EXPORT** goods. The companies have indicated the first two ports.

LOMBARDY

ROAD
88%

INTERMODAL
12%

93% GENOA
41% LA SPEZIA
2% LIVORNO

VENETO

ROAD
70%

INTERMODAL
30%

15% TRIESTE
49% VENICE
69% GENOA
6% LA SPEZIA

EMILIA ROMAGNA

ROAD
69%

INTERMODAL
31%

76% GENOA
30% LA SPEZIA
29% LIVORNO
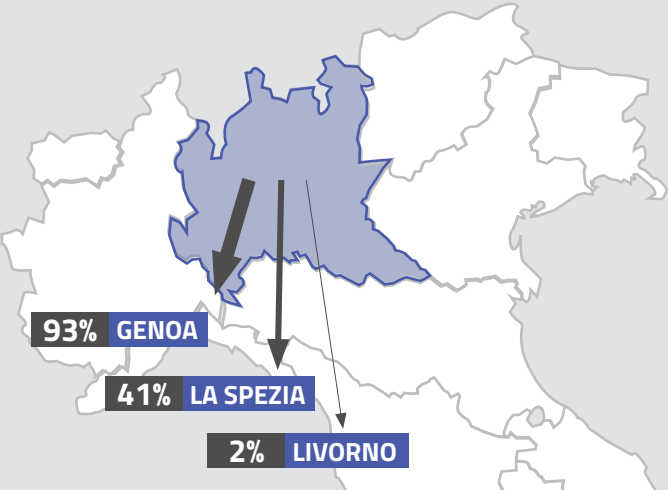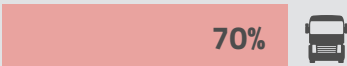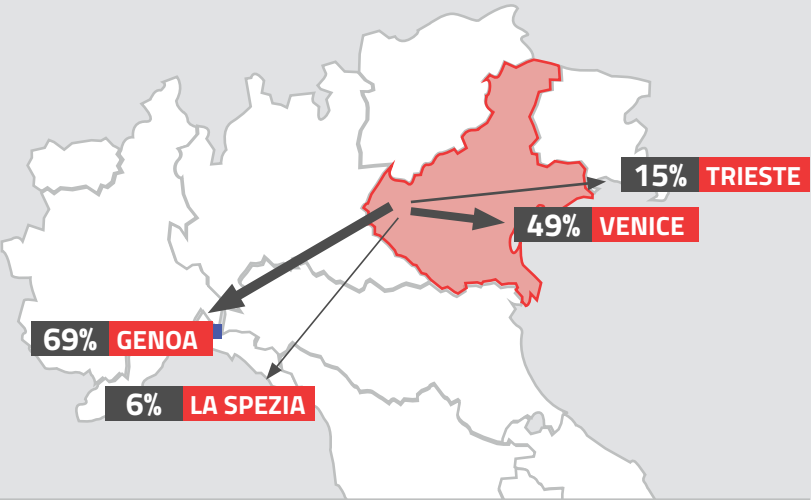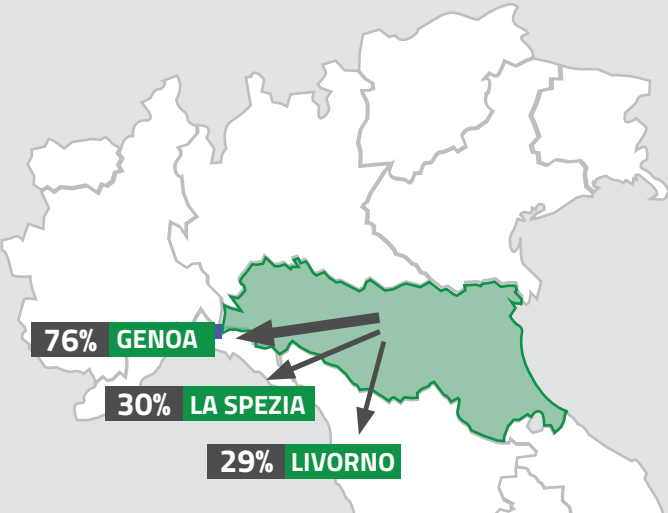
LOGISTICS CORRIDORS / ports of arrival

GENOA	73%
LA SPEZIA	25%
VENICE	20%

% of companies that declare to use the port for the **IMPORT** of goods. The companies have indicated the first two ports.

LOMBARDY

ROAD
89%

INTERMODAL
11%

3% VENICE
97% GENOA
41% LA SPEZIA

VENETO

ROAD
80%

INTERMODAL
20%

28% TRIESTE
55% VENICE
48% GENOA
8% LA SPEZIA

EMILIA ROMAGNA

ROAD
83%

INTERMODAL
17%

79% GENOA
30% LA SPEZIA
7% LIVORNO
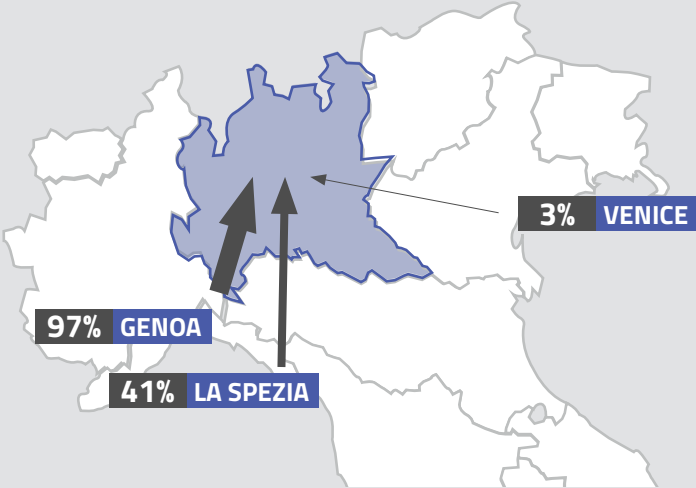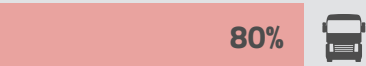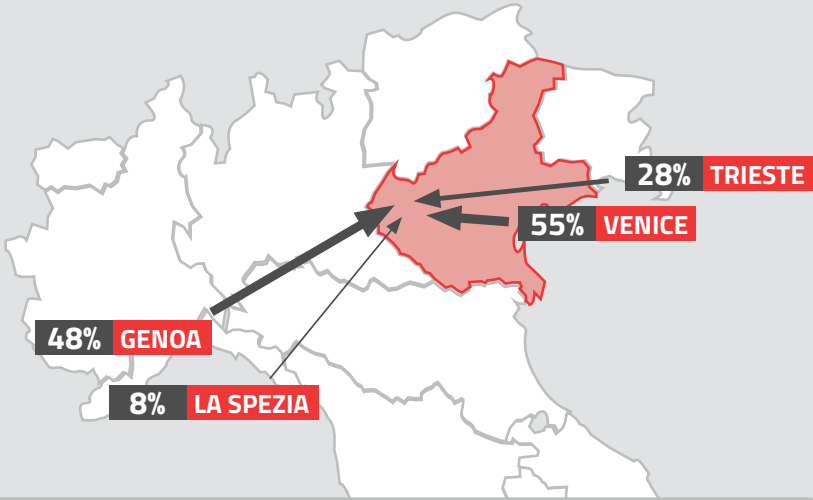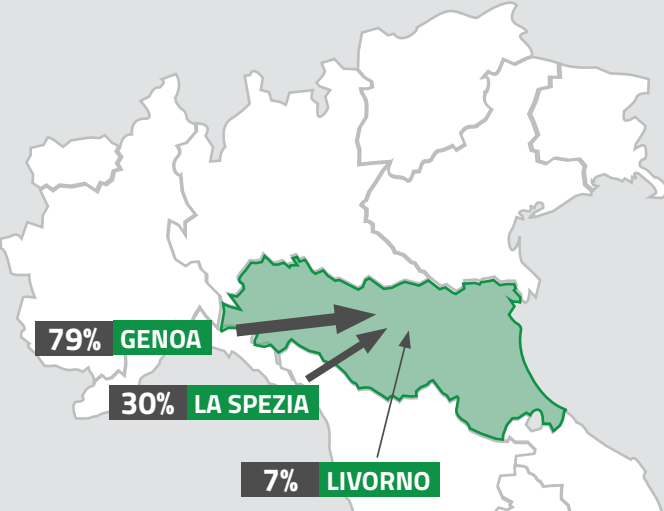
LOGISTICS CORRIDORS / connections with ports

% of companies that declare to use the mode of transport for import /export to and from the port.

LOMBARDY

GENOA
- 91%
- 9%

LA SPEZIA
- 82%
- 18%

VENETO

VENICE
- 72%
- 28%

GENOA
- 74%
- 26%

LA SPEZIA
- 38%
- 62%

EMILIA ROMAGNA

GENOA
- 86%
- 14%

LA SPEZIA
- 56%
- 44%
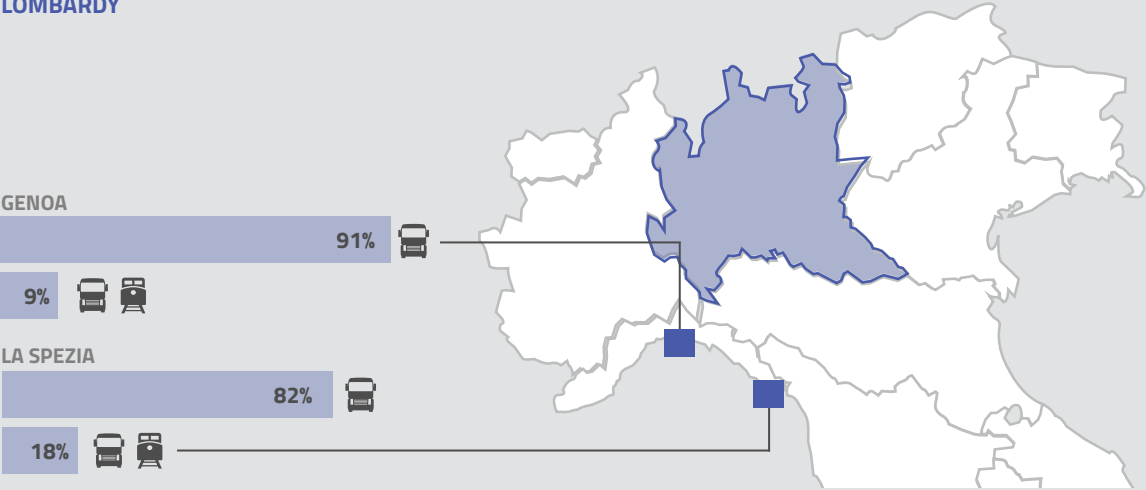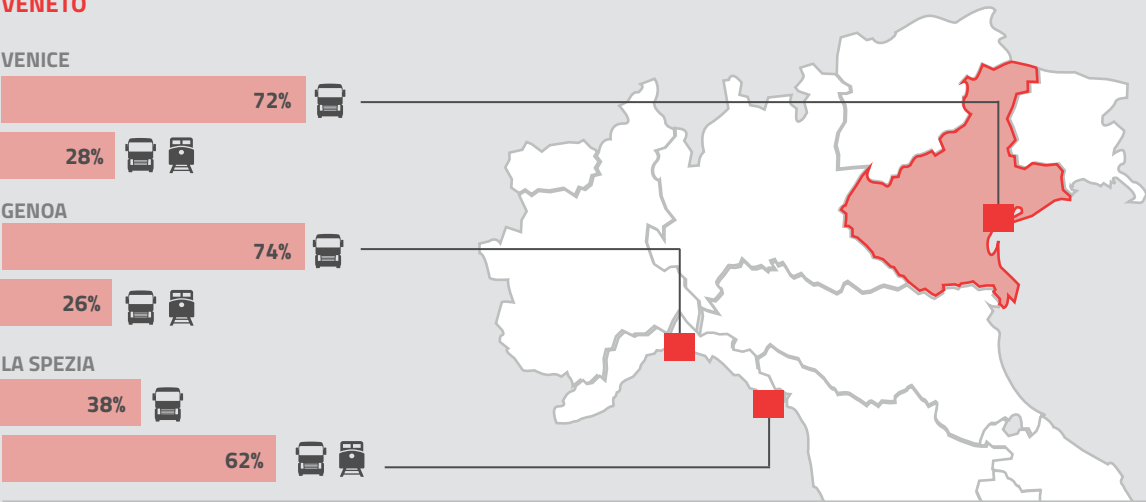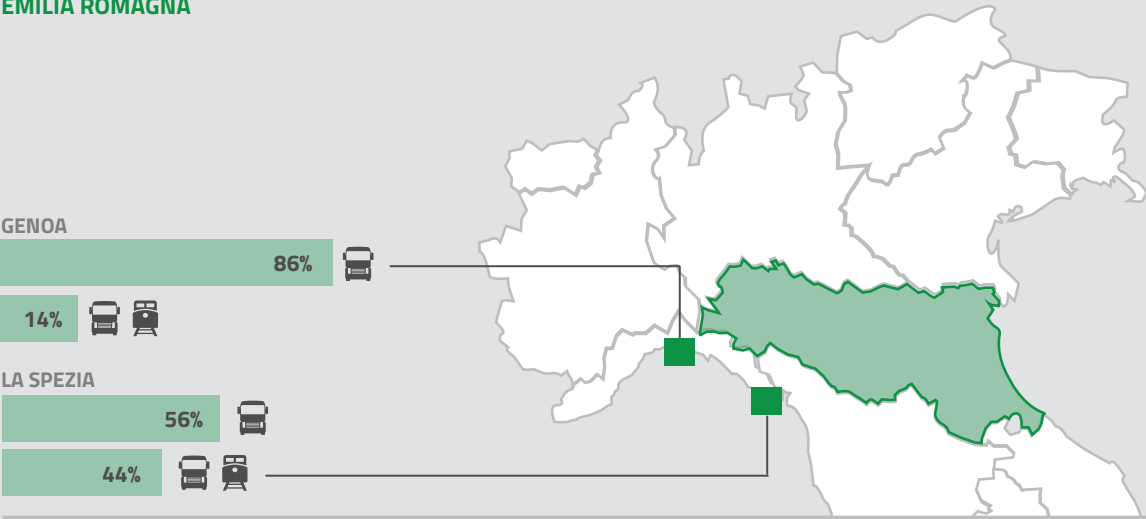
LOGISTICS CORRIDORS / countries of destination

EUROPE	50%
ASIA	37%
AMERICAS	29%

% of companies claiming to **EXPORT** to a given geographical area. The companies have indicated the first two destination areas.

LOMBARDY

- 20% NORTH AMERICA
- 47% EUROPE
- 40% ASIA
- 7% AFRICA
- 4% LATIN AMERICA
- 3% OCEANIA

VENETO

- 29% NORTH AMERICA
- 52% EUROPE
- 39% ASIA
- 6% LATIN AMERICA
- 2% AFRICA
- 2% OCEANIA

EMILIA ROMAGNA
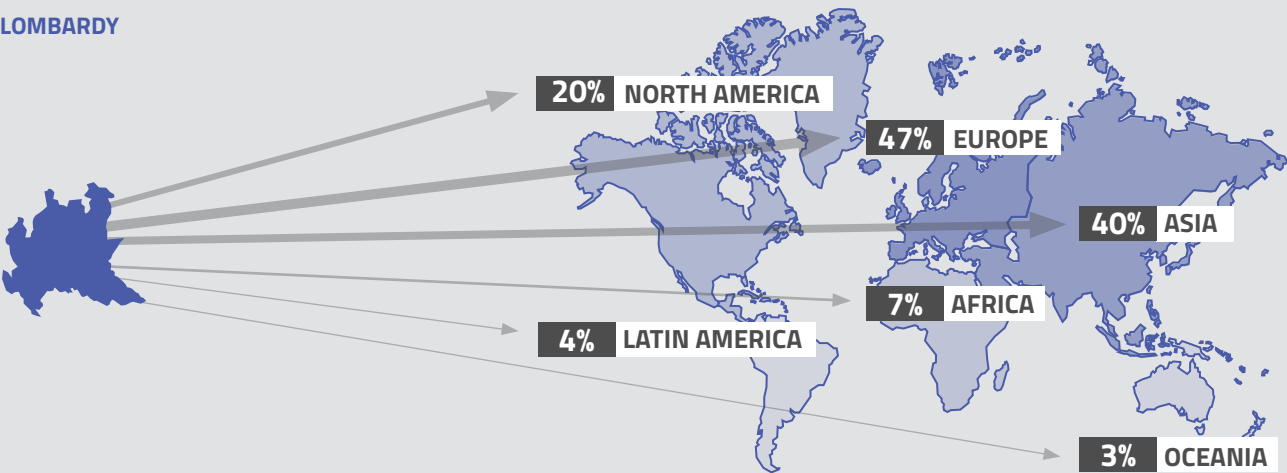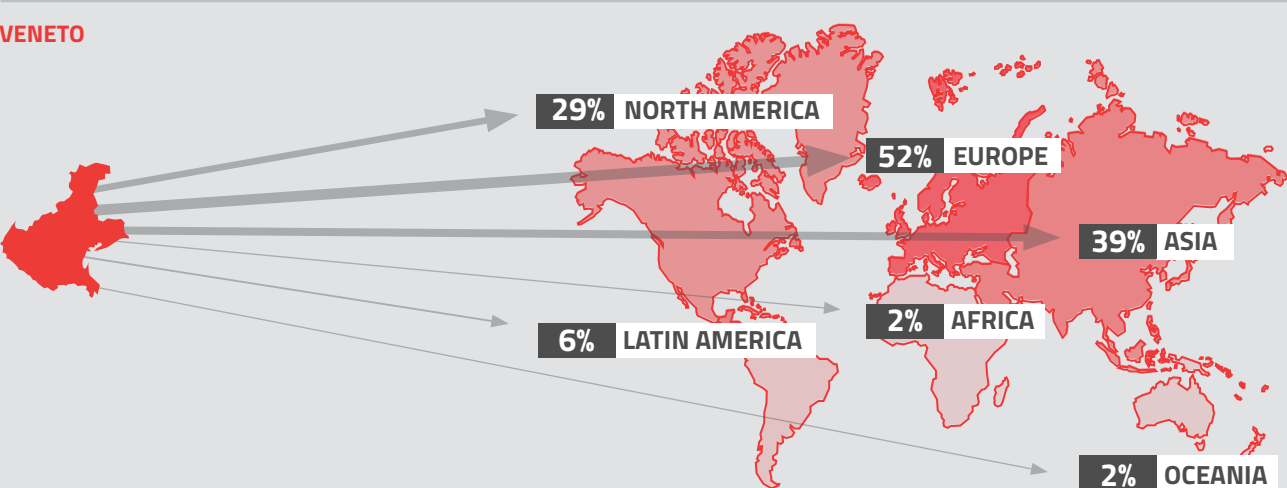
- 29% NORTH AMERICA
- 53% EUROPE
- 29% ASIA
- 9% AFRICA
- 4% LATIN AMERICA
- 3% OCEANIA
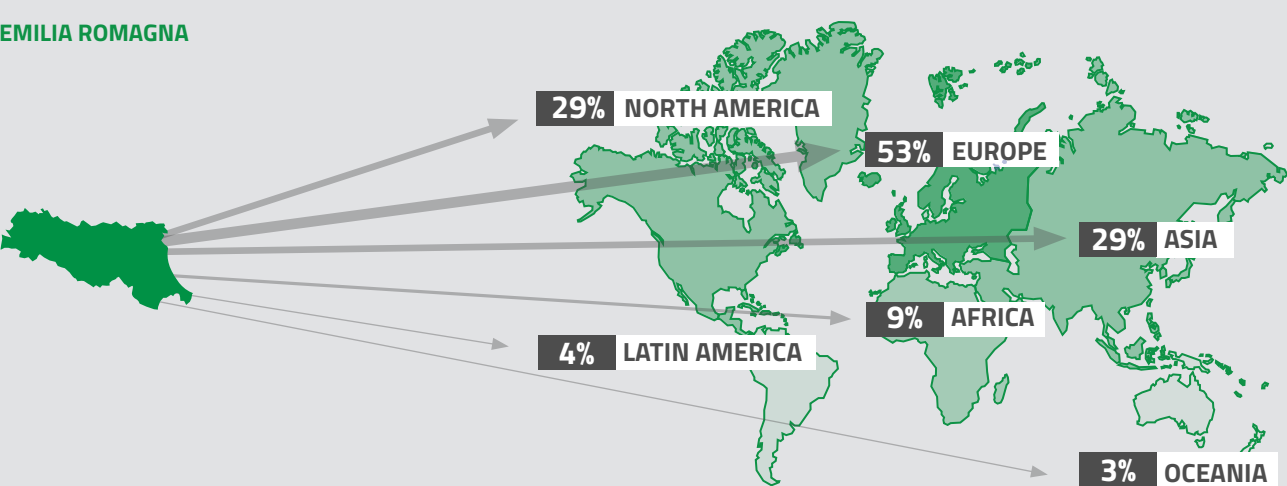
LOGISTICS CORRIDORS / countries of origin

ASIA	50%
EUROPA	49%
AMERICAS	20%

% of companies claiming to **IMPORT** from a given geographical area. The companies have indicated the first two areas of origin.

LOMBARDY

- **13%** NORTH AMERICA
- **34%** EUROPE
- **47%** ASIA
- **3%** LATIN AMERICA
- **3%** OCEANIA

VENETO

- **10%** NORTH AMERICA
- **40%** EUROPE
- **48%** ASIA
- **5%** AFRICA

EMILIA ROMAGNA
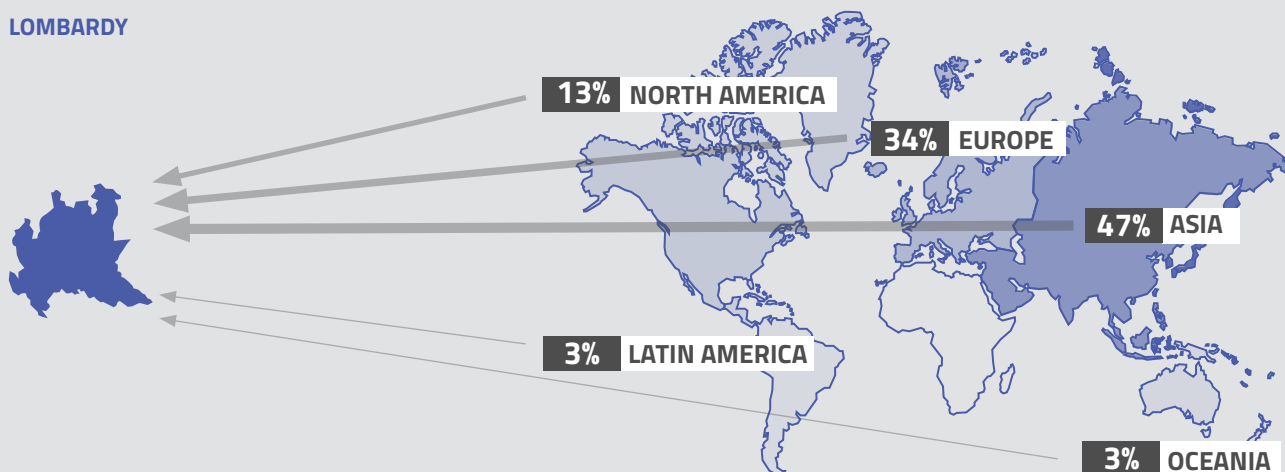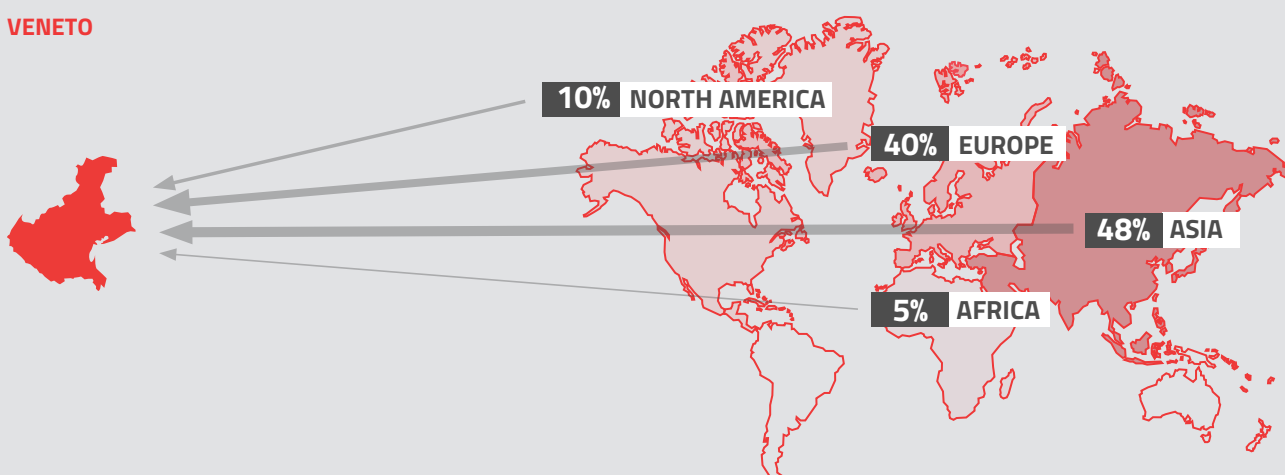
- **14%** NORTH AMERICA
- **42%** EUROPE
- **56%** ASIA
- **2%** AFRICA
- **2%** LATIN AMERICA
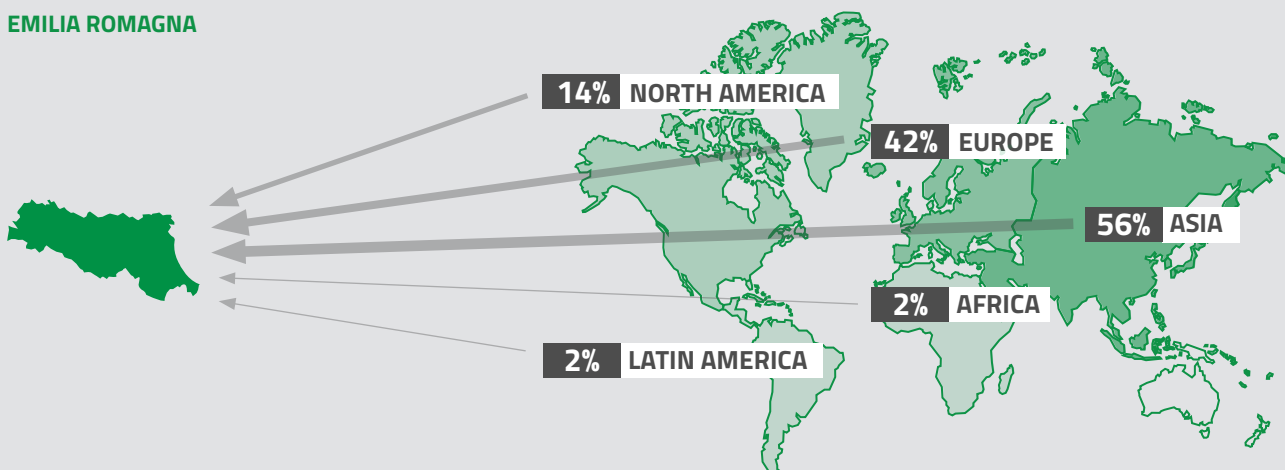
How is the logistics process managed?

The majority of companies state that they **outsource** logistics related to the export of goods

69%   OUTSOURCED LOGISTICS   **49%**

EXPORTS

IMPORTS

31%   INTERNALIZED LOGISTICS   **51%**
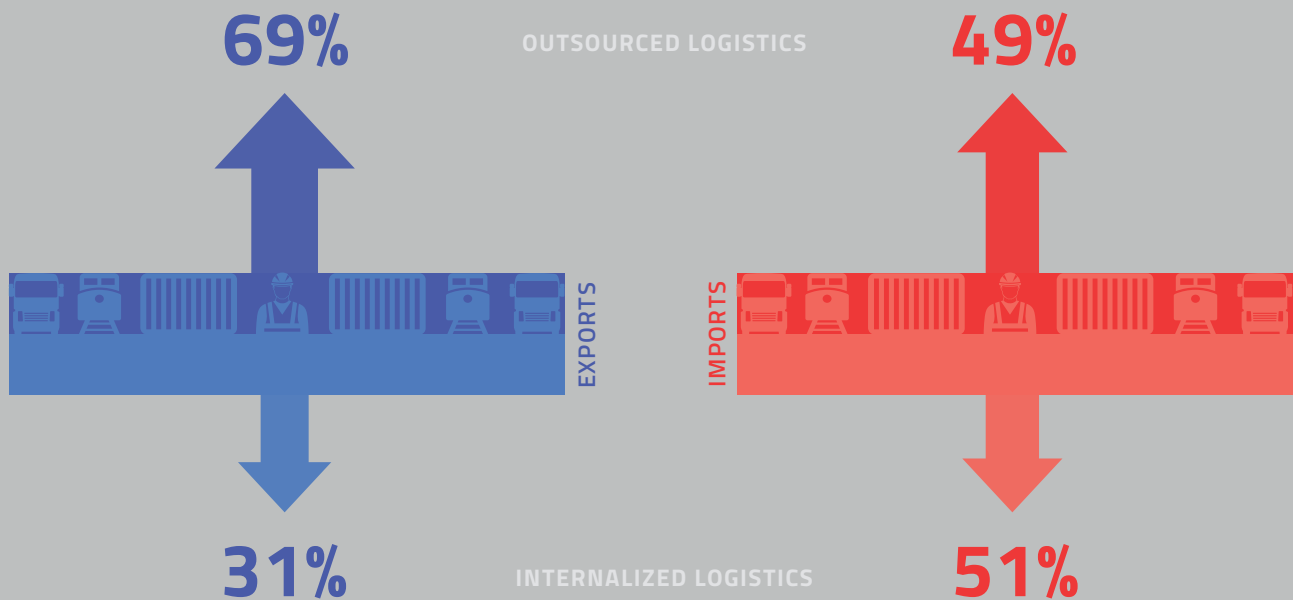
The **Ex Works** prevails in outbound logistics

67%
EXPORTS

44%
IMPORTS

SELLER
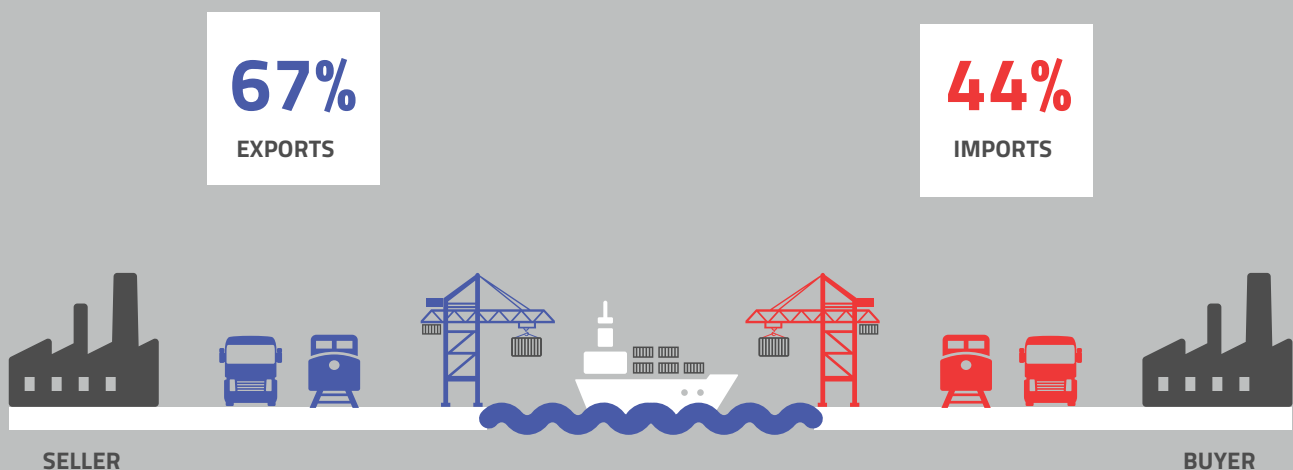
BUYER

LOW RISK

LOW COSTS

EXW / Contractual clause for which transport costs are completely borne by the buyer

QUALITY LOGISTICS ITALIAN INDEX

The **QLI²** shows the level of satisfaction (**7.59**) compared to the degree of importance (**8.4**) that the manufacturing companies interviewed give to their reference logistics system, assessed by assigning a score from 1 to 10 to **twelve variables** (see page 42) belonging to the categories «Services», «Costs», «Infrastructures», and «Sustainability».

	LOMBARDY	VENETO	EMILIA ROMAGNA

SERVICES

8.45 AVERAGE IMPORTANCE	8.75	8.18	8.40
7.59 AVERAGE SATISFACTION	7.84	7.17	7.89

COSTS

8.44 AVERAGE IMPORTANCE	8.72	8.18	8.42
7.64 AVERAGE SATISFACTION	7.85	7.24	7.97

INFRASTRUCTURES

8.40 AVERAGE IMPORTANCE	8.77	8.08	8.34
7.58 AVERAGE SATISFACTION	7.81	7.16	7.90

SUSTAINABILITY

8.34 AVERAGE IMPORTANCE	8.54	8.11	8.36
7.54 AVERAGE SATISFACTION	7.70	7.15	7.91
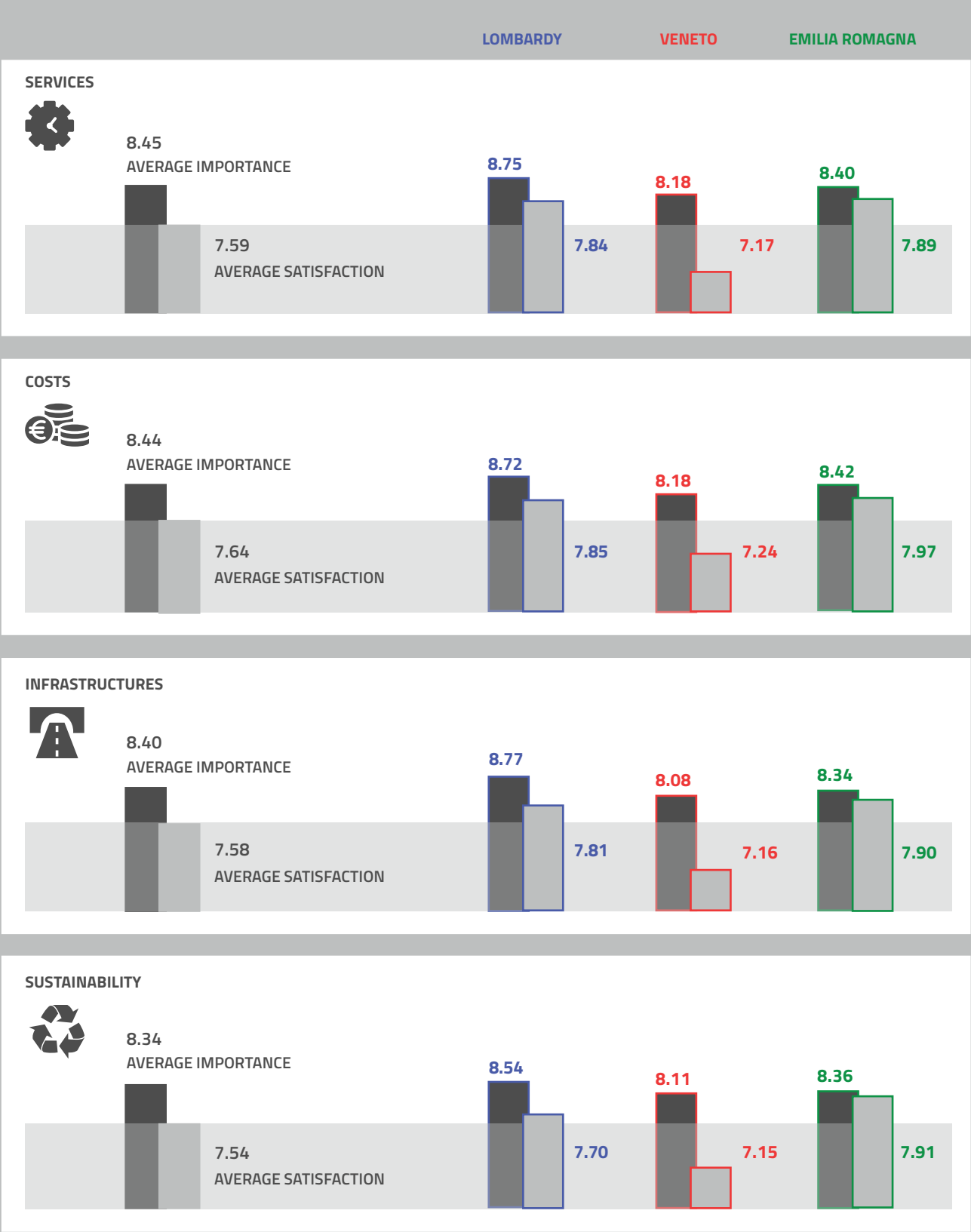
FOCUS / EMERGING SUSTAINABILITY

Increasing demand for environmental sustainability over the next two years

More and more companies believe that customer awareness of sustainability will increase

18%
2019

34%
2021

Packaging among the priorities of sustainable companies

Packaging and material chosen as main KPI

50%

ECO

ECO

Sustainable from the birth

16%
Sustainability is an element of internal governance

10% Since the company was born

A district with over half a billion exports

cumulated values

182 bn €
Q3 2008

536 bn €
Q3 2018

North America main destination for the majority of companies

% of companies considering the market as one of the two main destinations

85% NORTH AMERICA

31% EUROPE

15% ASIA
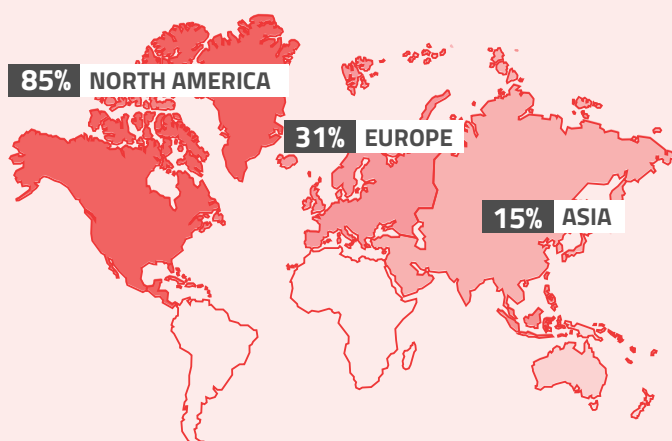
Ex works preferred by all companies

100%

Exports disputed between Genoa and Venice

The port is among the two main alternatives used

54%   **62%**
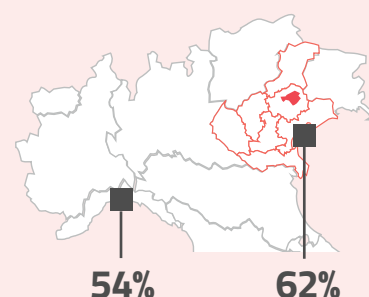
23% choose intermodal

The preferred method of transporting goods to the port and vice versa

77%

23%
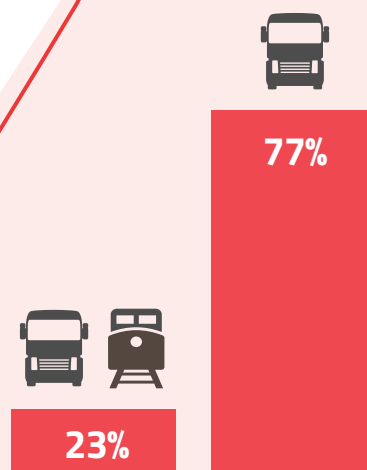
For companies, over the next two years, customers will place greater value on environmental sustainability in their production areas

CISON DI VALMARINO

FOLLINA

MIANE

TARZO

VITTORIO VENETO

COLLE UMBERTO

VALDOBBIADENE

SAN PIETRO DI FELETTO

REFRONTOLO

FARRA DI SOLIGO

PIEVE DI SOLIGO

SAN VENDEMMIANO

VIDOR

CONEGLIANO

SUSEGANA

31% 2019

54% 2021
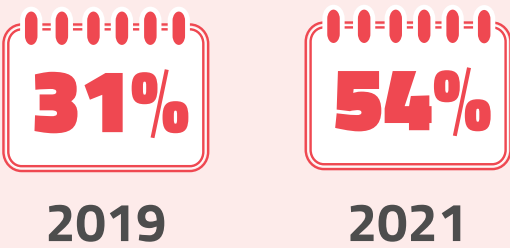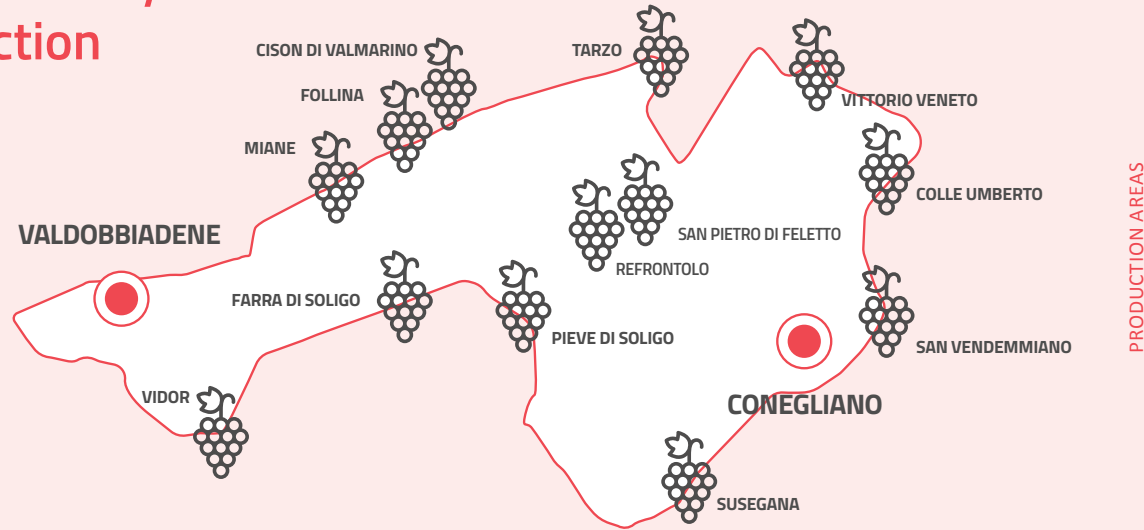
Satisfaction and average importance of the logistics system

8.59

Average importance

7.64

Average satisfaction

Focus group and follow up of Survey 2018

The Focus Group, further enhancement of the publication

Following the publication of the first edition of the survey in December 2018, we identified and brought together in early 2019, in a technical focus group, a panel composed of shippers, freight forwarders, logistics operators and researchers to collect reflections and ideas which are useful for refining the second edition of the survey. This phase represented a key element to give dynamism and effectiveness to the survey.

A sectoral remodulation of the sample

"The drug industry still uses a lot of air travel, but it is moving towards the sea, even though it requires services and technologies which are able to guarantee certain transport conditions (temperature control, humidity, etc.)".

"Restricting the panel to districts only could exclude some interesting players, such as the pharmaceutical and cosmetics sectors (Piacenza, Cremona)."

The work group has made a new strategic choice: to re-modulate the sample from a sectorial point of view, increasing the representativeness, in terms of number of companies, of the chemical pharmaceutical industry, considered to be of particular economic interest at this point in Italian history.

This change has, in part, influenced some of the variables analysed, such as the study of the destination markets and origin of the goods, where the basic trends, while remaining reliable, are naturally influenced by the greater propensity of the pharmaceutical sector to invest in European markets.

Further investigation into intermodality

Among the various suggestions collected, we have paid particular attention to the deepening of the motivations that guide the choice of the different modes of transport. In this second edition of the survey, in addition to recording the mode of transport preferred by companies, we have therefore included a question about the reasons for the preference, in an attempt to identify the factors that most influence the choice between road and intermodal modes of transport.

Sustainability as a "mandatory" topic

"Logistics often seen as pure cost, not an opportunity or leverage for competitiveness".

Another topic requiring question to be more clearly articulated, in order to record more accurately the position of the various companies interviewed, is that of sustainability; a specific section dedicated to the topic has been added to the basic questionnaire in order to understand how much importance manufacturing companies give to this driver, how strategic

they consider it to be, what their opinion is on the demand for sustainability from consumers and end users and what are the main actions taken on this front.

Confirmation

Another stimulating reflection emerged, extremely widespread among the exporters interviewed, following the indications provided by various shippers, who invited us to investigate the reasons for the preference of Incoterm Ex Works.

"The company that chooses the clause Ex Works not only yields costs and (apparently) risks, but also control. For example, it has no indication of the actual place of customs clearance of the goods, which could be declared for export to destinations outside Europe, but could in fact be redirected (either within the Community or outside via re-invoicing) without the producer having any findings from the operation".

Territorial specificities

"Districts are an important driver of development and growth for exports. Supporting them with an appropriate logistics system would contribute to the stability and further improvement of their performance".

Finally, the comparison with the panel showed a general interest in a systematic survey of specific production clusters. We therefore chose to extend the questionnaire to companies in a district (Case Study): a specific focus was therefore added on the companies that make up the prosecco district of Conegliano Valdobbiadene in Veneto, one of the most important districts in terms of growth and potential for Italian exports of quality products.

Characteristics of container traffic

Lombardy, Emilia Romagna, and Veneto: together they make up 53% of the Italian trade with foreign countries

Lombardy, Emilia Romagna, and Veneto are the three main Italian regions in terms of trade with foreign countries. In total, in 2018 they achieved € 473 billion of import/export (53.2% of the Italian trade with foreign countries), increased by 5.3% since 2017, and for 2019, based on the half-year data, the value could increase by an additional 10 billion and reach 483 billion (SRM estimates). More specifically, Lombar-dy covers 29.4% (261 billion in 2018) of Italian foreign trade, Veneto 12.6% (112 billion), and Emilia Romagna 11.3% (100 billion).

Business in the three regions is thriving and accounts for a large part of the Italian GDP (40.7%): Lombardy 22.2%; Veneto 9.4%; Emilia Romagna over 9%.

The maritime trade represents an important component (second only to road transport) of the foreign trade of these regions: the sum of the four modes of transport is 100 (thus excluding the component not specified in the Istat database), sea trade represents 28.2% for Lombardy, 32.3% for Veneto, 36.1% for Emilia Romagna (to be compared with 37.1% for Italy).

Importance of maritime trade

% of total foreign trade*

ROAD
- Lombardy: 55.7%
- Veneto: 52.3%
- Emilia Romagna: 53.8%
- Italy: 49.1%

MARITIME
- Lombardy: 28.2%
- Veneto: 32.3%
- Emilia Romagna: 36.1%
- Italy: 37.1%

AIR
- Lombardy: 13.4%
- Veneto: 10.2%
- Emilia Romagna: 8.9%
- Italy: 11.5%

RAILWAY
- Lombardy: 2.7%
- Veneto: 5.2%
- Emilia Romagna: 1.2%
- Italy: 2.5%

Legend: Lombardy, Veneto, Emilia Romagna, Italy
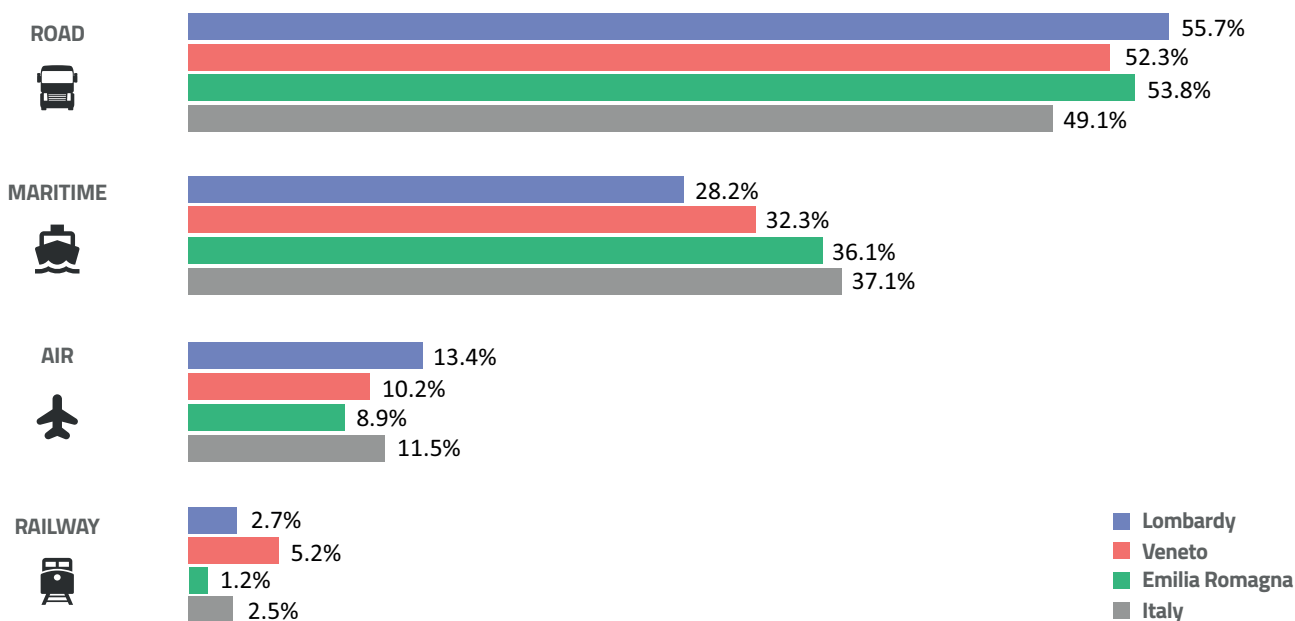
* The total trade considered for the calculation of percentages excludes the "unspecified" option in Istat statistics.

Figure 1 - Source: SRM/Contship on Istat

Growing number of companies dealing with high import volumes

Given that these are mainly manufacturing companies, the container is an important element for the transport of Italian goods abroad and vice versa.

The Italian business community (and therefore also of the regions targeted by the Survey), though made up of small and medium-sized entities, is reflected in the intensity of the use of the instrument: most companies "use, on average, no more than 1 container per week" both in export and import activities.

The companies that make more than 50 containers per year in export are 8% of the total (down from 11% last year). The percentage of companies importing more than 50 containers per year is growing, from 15% to 24%.

Companies with import or export containerised volumes of goods

% of undertakings handling more than 50 containers per year

EXPORTS		
2018	11%	
2019	8%	↓

IMPORTS		
2018	15%	
2019	24%	↑
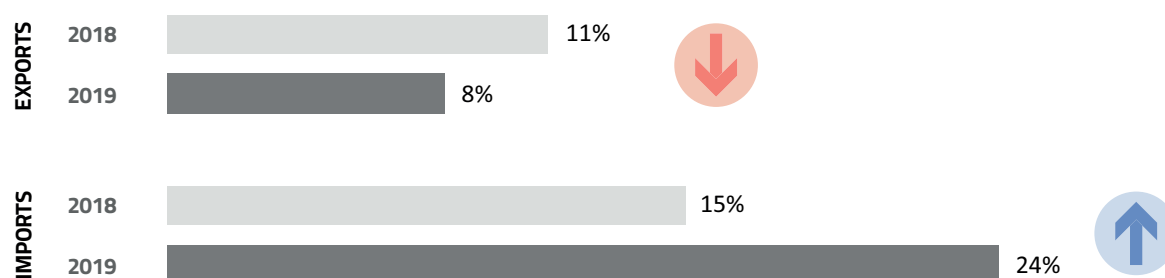
Figure 2 - Source: SRM/Contship on Istat

Distribution of companies by number of containers exported and imported

% of companies per container band

		LOMBARDY %	VENETO %	EMILIA ROMAGNA %
EXPORTS 0-50	92%	95	92	87
51-500	8%	5	8	13
IMPORTS 0-50	76%	94	78	60
51-500	24%	6	22	40
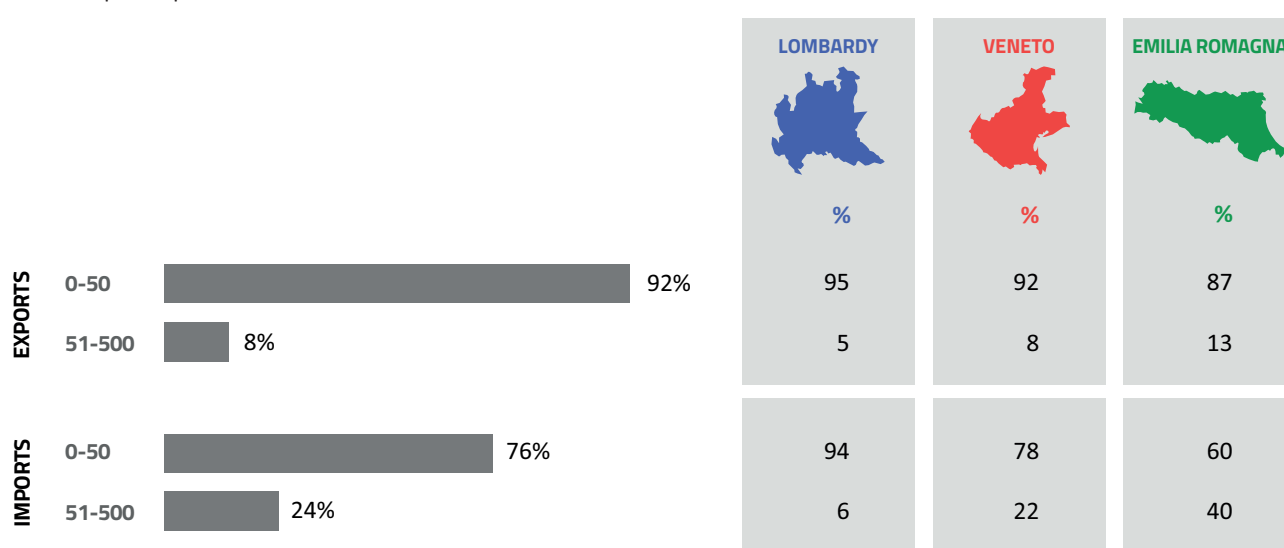
Figure 3 - Source: SRM/Contship on Istat

Time and cost are the main drivers in the choice of using intermodal transportation

An element which is important for the analysis and improvement of the "logistics corridor", is the understanding of the main method of connection between the industry and the ports, i.e. once the goods have arrived at the port, how it arrives at the company premises and vice versa. As was already shown in the last survey, companies still prefer road transport for the last part of the route.

In the area investigated, intermodal transportation remains a choice adopted by only 17% of companies (compared to 19% in 2018). Of the three regions, while Veneto sees a significant increase in the share of companies opting for intermodal transport, this percentage has dropped significantly in Lombardy. In addition, companies choosing the intermodal option were asked about the three main drivers behind this choice. The survey showed that the most significant shares of companies – over 85% – occur for two reasons: a) the convenience of the service and b) the frequency of the service.

Companies opting for intermodal

% of companies refer to both incoming goods and outgoing goods

TOTAL
- 19%
- 17%

LOMBARDY
- 33%
- 10%

VENETO
- 6%
- 25%

EMILIA ROMAGNA
- 17%
- 15%

- 2018
- 2019
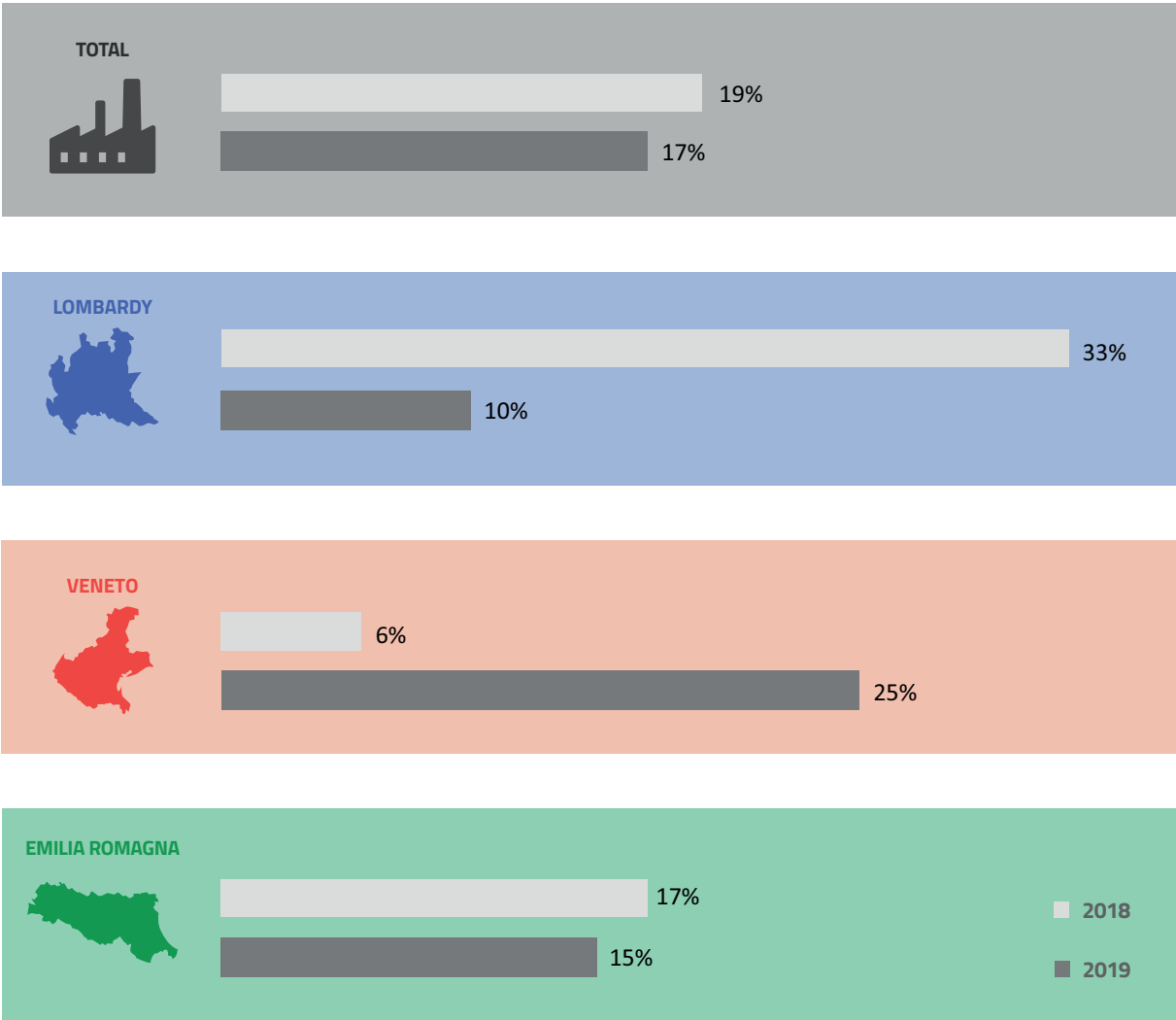
Figure 4 - Source: SRM/Contship on Istat

Main mode of connection with the port[*]

	LOMBARDY	VENETO	EMILIA ROMAGNA
ROAD			
83%	90%	75%	84%
RAIL			
6%	1%	14%	-0
INTERMODAL			
11%	9%	11%	15%
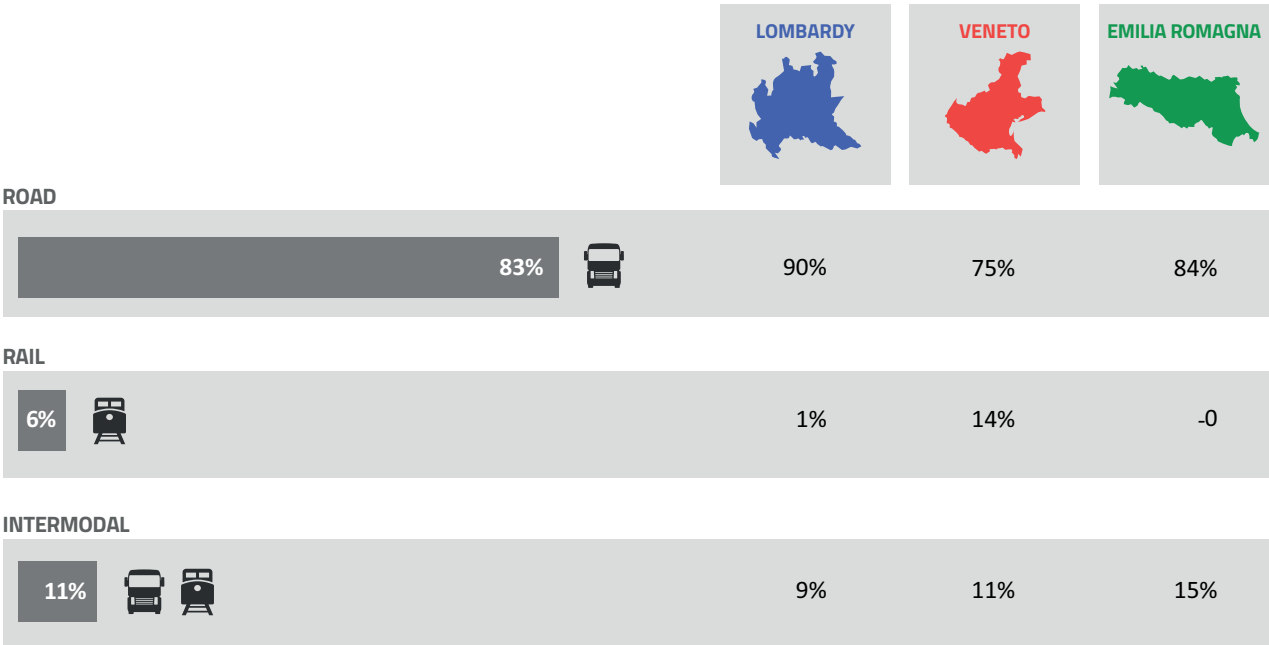
[*] The percentages of companies refer to both incoming and outgoing goods.

Figure 5 - Source: SRM/Contship on Istat

Factors that lead to the choice of intermodal transportation

% of the companies that use intermodal. Each company was asked to indicate three preferences

	%	LOMBARDY %	VENETO %	EMILIA ROMAGNA %
CONVENIENCE OF SERVICE	91	100	84	100
ADEQUATE FREQUENCY OF SERVICES	87	100	78	94
ECONOMY OF SCALE	59	60	68	38
FOR SUSTAINABILITY REASONS	57	40	62	63
PRESENCE OF INTERMODAL HUBS NEAR WAREHOUSES	6	0	8	6
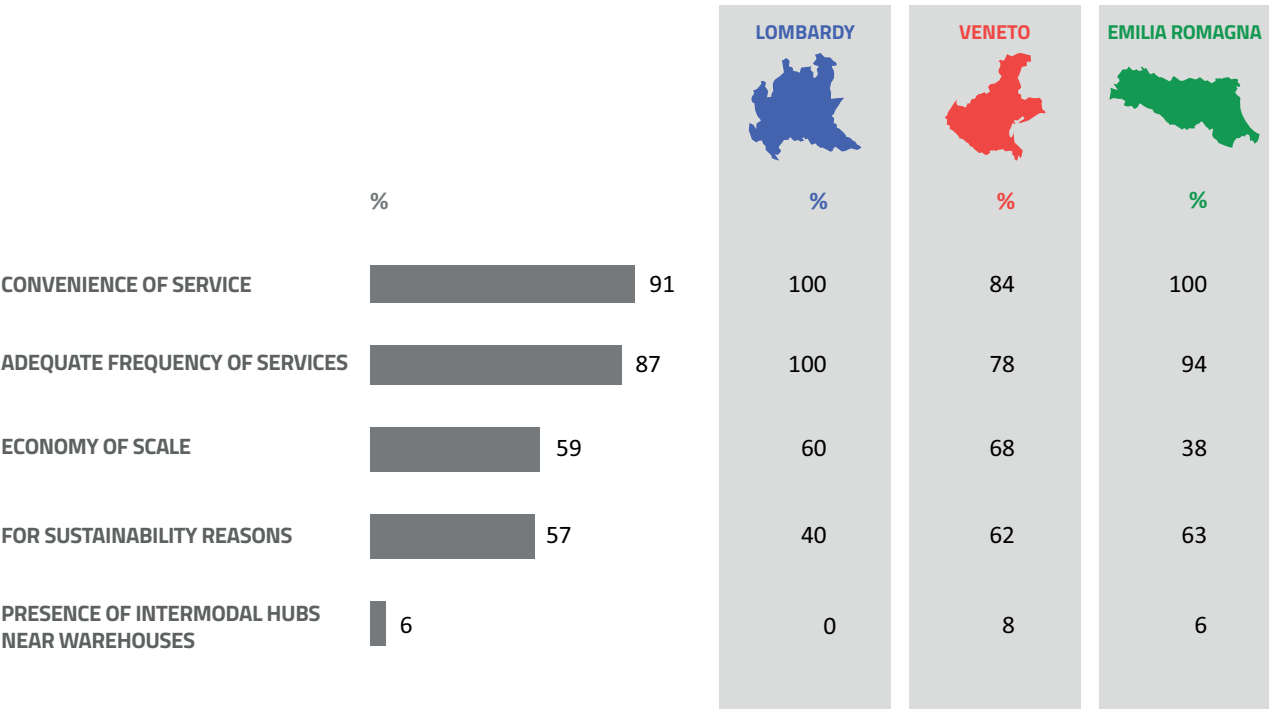
Figure 6 - Source: SRM/Contship on Istat

Genoa reinforces its position of primacy as the most used port by companies. La Spezia undergoing extensive relaunch in Lombardy

Genoa confirms its position as the port used by most companies. Manufacturing companies were asked to indicate "the two ports mainly used for export and import"

The port of Genoa boasts 80% for exports (72% in 2018) and 73% for imports (55% in 2018). La Spezia and Venice are among the two preferred ports respectively for 25% and about 20% of companies, both in export and import. The percentage of companies opting for Trieste is growing. It should be noted that the figure for

Genoa is higher for companies located in Lombardy: over 90% for both incoming and outgoing goods. It stands at about 70% for exports and 48% for imports into Veneto, while it exceeds 75% for both exports and imports in the case of companies in Emilia. A higher percentage of Venetian companies choose Venice as one of the main ports of reference (49% in exports and 55% in imports) and Trieste (15% in exports and 28% in imports).

La Spezia recorded among Lombard companies as having excellent performance standards, with a total of 41% in exports and imports – and among companies in Emilia (30%). Livorno is doing well in terms of exports for Emilian companies (29%).

Ranking of the main ports used

% of companies which indicated the reported port[*]
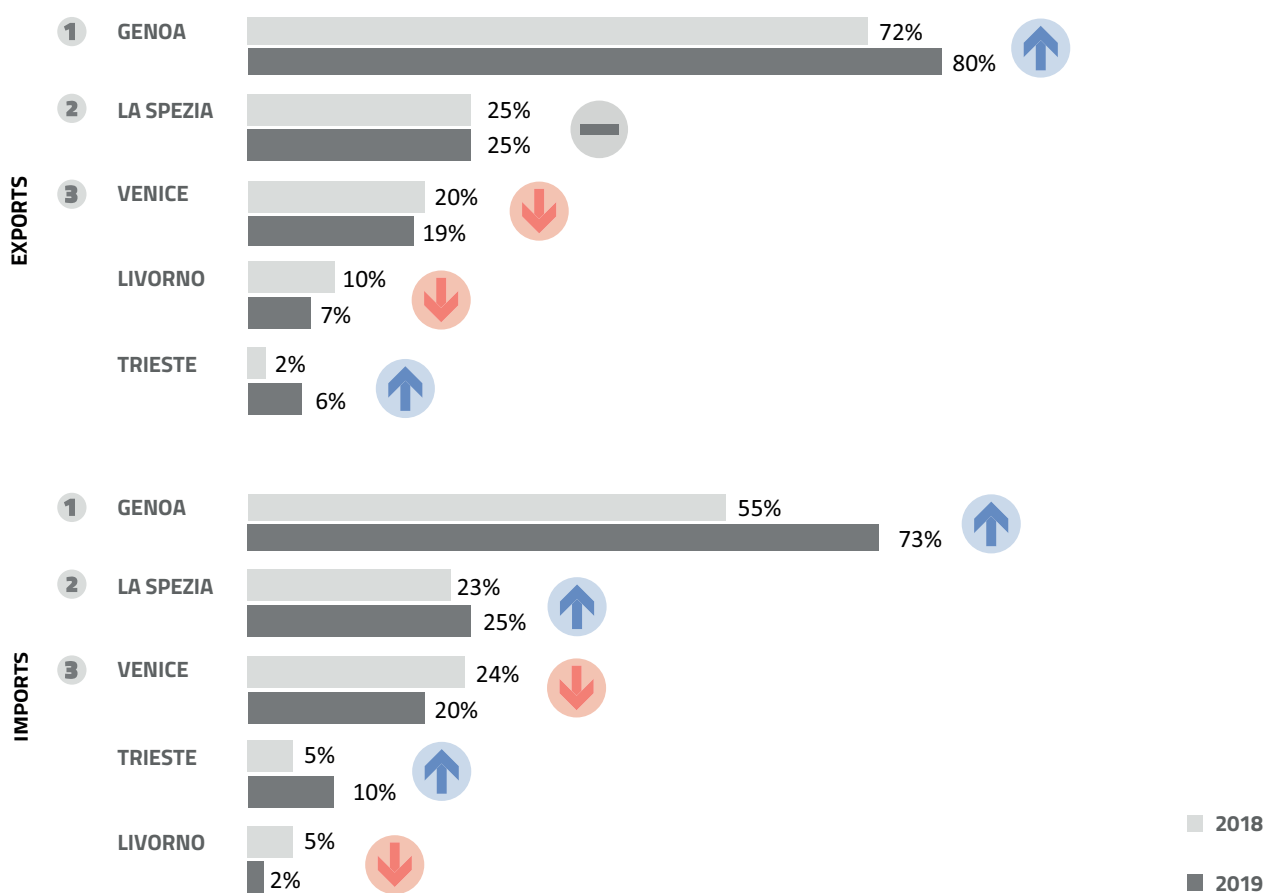
[*] Having given companies the possibility to express two preferences, the sum of the percentages does not amount to 100.

Figure 7 - Source: SRM/Contship on Istat

Ranking of the main ports used with regional differences

% of companies which indicated the reported port[*]
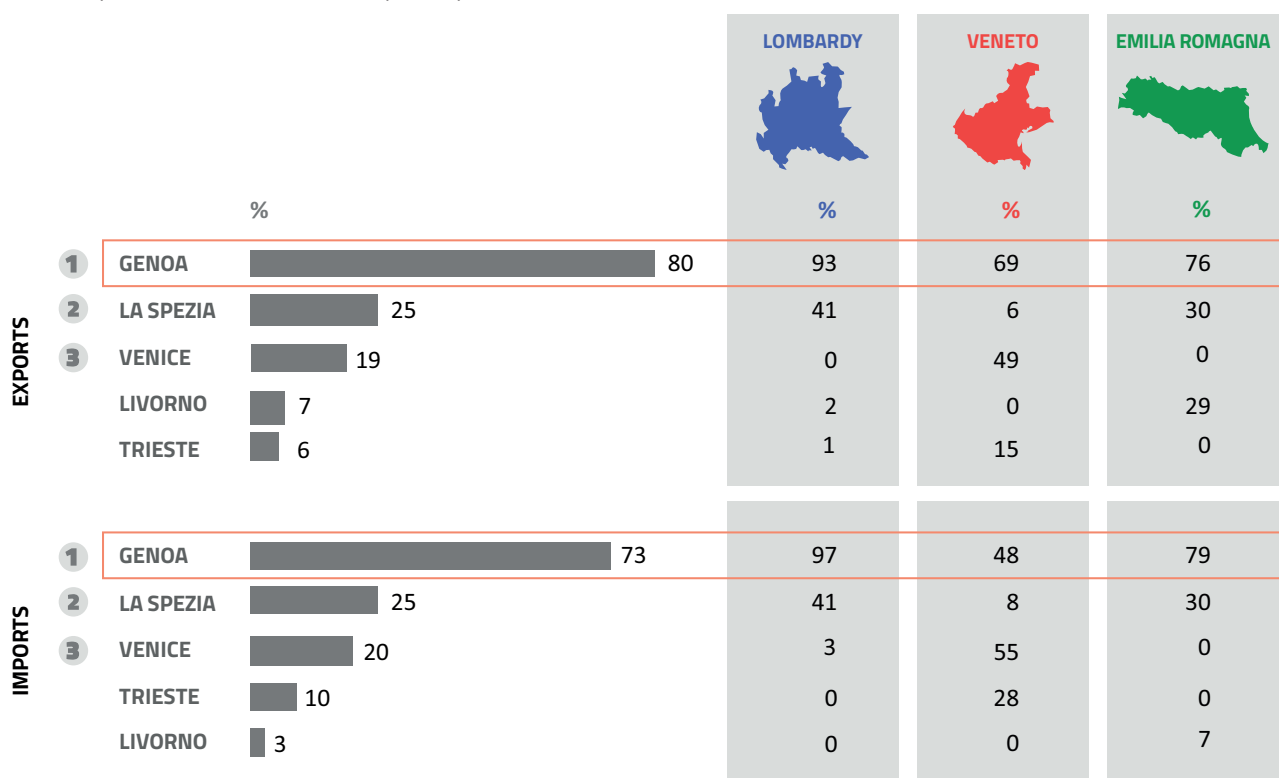
		%	LOMBARDY %	VENETO %	EMILIA ROMAGNA %
EXPORTS 1	GENOA	80	93	69	76
2	LA SPEZIA	25	41	6	30
3	VENICE	19	0	49	0
	LIVORNO	7	2	0	29
	TRIESTE	6	1	15	0
IMPORTS 1	GENOA	73	97	48	79
2	LA SPEZIA	25	41	8	30
3	VENICE	20	3	55	0
	TRIESTE	10	0	28	0
	LIVORNO	3	0	0	7

[*] Having given companies the possibility to express two preferences, the sum of the percentages does not amount to 100.

Figure 8 - Source: SRM/Contship on Istat

Container traffic in the 5 main ports used by the companies of the Survey

The 5 ports indicated by the companies in our survey are among the first 6 Italian ports for annual container traffic. According to the last available updates to the date of publication, in 2019 Genoa moved 2 million 615 thousand containers, a slight increase from 2018 (+0.2%), ranking first in Italy with respect to container traffic. Followed by La Spezia with 1.4 million TEU (-5.1% compared to 2018), Livorno, whose figures for the first half of the year show an increase of 11.7% compared to 2018 (reaching, according to our estimates, 835 thousand TEU at the end of the year). The volumes managed by Trieste were also significant, with about 790 thousand TEU in 2019 (+8.8%) and Venice (593 thousand TEU in 2019; -6.2%).

Container traffic in the 5 main ports used by the companies included in the Survey

	2018	2019	CHANGES % 2018-2019
Genoa	2,609,138	2,615,375	0.2
La Spezia	1,485,623	1,410,000	-5.1
Livorno[*]	363,902	406,594	11.7
Trieste	725,426	789,594	8.8
Venice	632,250	593,000	-6.2

[*] As regards the port of Livorno, the data refer to the first half of the year.

Table 1 - Source: SRM/Contship

The goods come from Asian countries. We export a lot to Europe

If in the previous paragraph we focused on the Italian points of arrival and departure for the goods exchanged abroad by sea, now we change perspective and we move on to the analysis of the foreign points of landing for exported and of departure for imported goods: where the goods we export go and where the goods we import come from. It should be noted that although the basic trend expressed in the following graphs is interesting and true, it is partly affected by the sectoral reshaping of the sample in 2019 compared to 2018.

Asia is between the two main markets for 37% of companies, Europe for 50% (vs. 12% in 2018). For imports, Asia is among the main supply markets for 50% of companies, Europe for 39%.

Import and export: main areas-partners

% of companies exporting to/importing to and from the area[*]
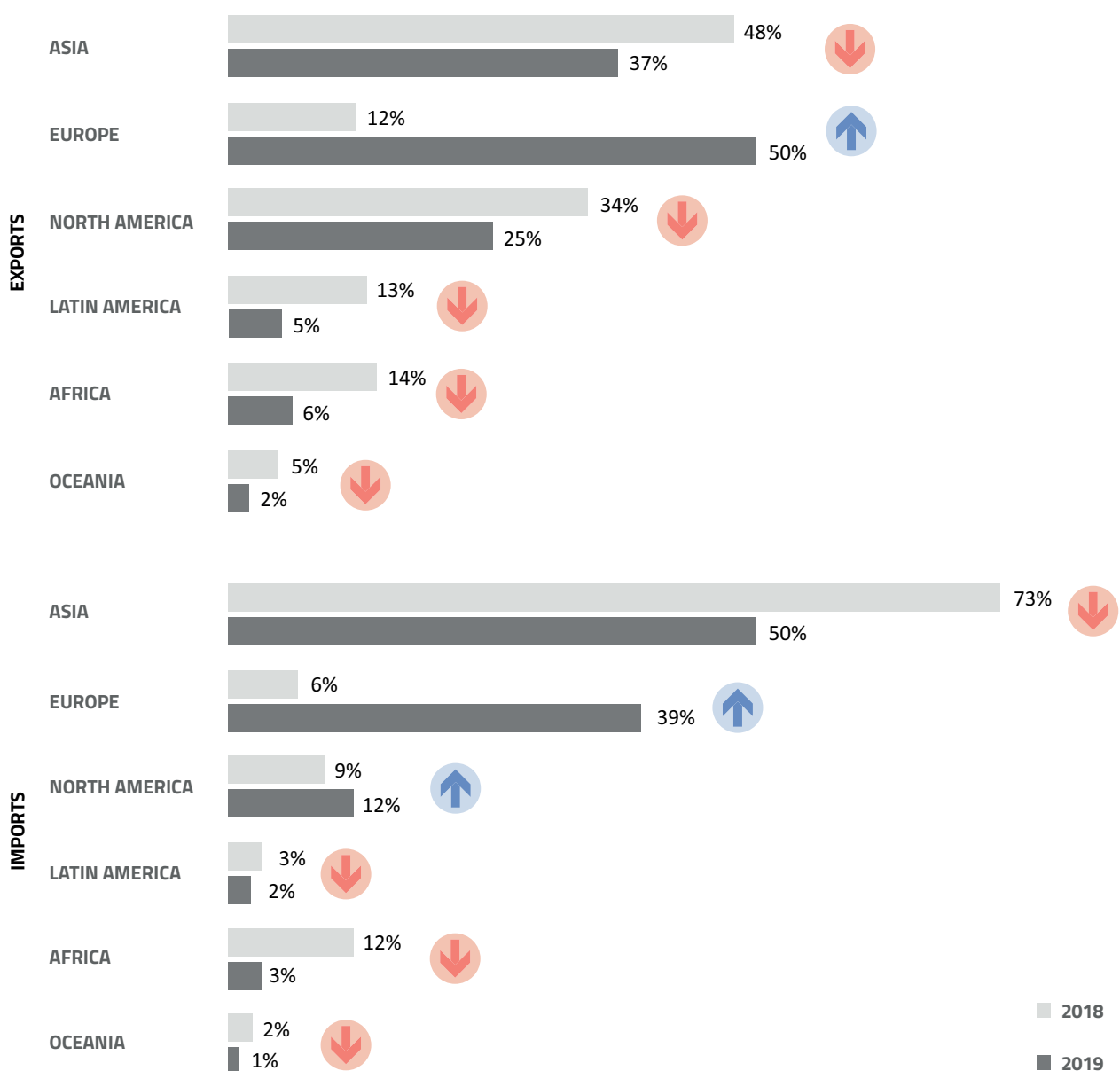
[*] The companies were asked to indicate the two main markets, so the sum of the values does not amount to 100.

Figure 9 - Source: SRM/Contship

28

Export: main areas and partner countries

% of enterprises exporting to the country/area[*]

FIRST + SECOND COUNTRY FOR EXPORT	TOTAL %	LOMBARDY %	VENETO %	EMILIA ROMAGNA %
ASIA	**37**	**40**	**39**	**29**
China/Hong Kong	15	17	39	11
Asia	7	11	15	1
India	4	4	6	3
Saudi Arabia / United Arab Emirates / Middle East	4	3	5	1
Russia	3	4	7	3
Korea	2	2	2	1
Turkey	2	1	1	3
Bangladesh	1	1	3	0
Japan	1	1	2	3
Israel	1	1	1	0
Thailandia	1	2	1	1
Vietnam	1	2	1	1
AMERICA	**29**	**24**	**33**	**30**
North America	25	20	29	29
United States	23	19	25	26
North America	2	1	2	1
Canada	2	0	2	4
Latin America	5	4	6	4
South America	2	2	2	1
Mexico	1	0	2	3
Argentina	1	1	2	0
Brazil	1	1	1	0
AFRICA	**6**	**7**	**2**	**9**
Africa gen.	3	3	1	6
Egypt	1	1	1	0
Morocco	1	2	0	0
Tunisia	1	1	0	1
North Africa	1	1	1	0
EUROPE	**50**	**47**	**52**	**53**
Europe gen.	14	12	19	10
Spain	12	13	5	20
France	10	12	6	13
Germany	8	10	11	1
United Kingdom	5	4	5	7
Greece	2	0	2	7
North Europe	2	1	6	0
Cyprus	1	1	0	1
Danmark	1	2	1	0
Croatia	1	0	0	3
Holland	1	1	1	0
Romania	1	0	1	1
East Europe	1	1	2	0
OCEANIA: AUSTRALIA	**2**	**3**	**2**	**3**

[*] Companies were asked to indicate the two main markets, so the sum of the values does not amount to 100.

Figure 10 - Source: SRM/Contship

Import: main areas and partner countries

% of companies importing from the country/area*

FIRST + SECOND COUNTRY FOR IMPORTS	TOTAL %	LOMBARDY %	VENETO %	EMILIA ROMAGNA %
ASIA	**50**	**47**	**48**	**56**
China/Hong Kong	23	25	18	26
Japan	11	22	20	12
India	7	0	5	7
Korea	4	9	5	7
Turkey	3	0	3	5
Israel	2	3	0	2
Saudi Arabia / United Arab Emirates / Middle East	2	3	3	0
Bangladesh	1	3	0	0
Indonesia	1	3	0	0
Malaysia	1	3	0	0
Russia	1	3	0	2
Taiwan	1	0	0	2
Vietnam	1	0	0	0
AMERICA	**20**	**22**	**23**	**16**
America gen.	6	6	13	0
North America	12	13	10	14
United States	10	13	8	12
Canada	2	0	0	5
Latin America	2	3	0	2
Mexico	1	3	0	2
AFRICA	**3**	**0**	**5**	**2**
North Africa	2	0	5	0
EUROPE	**39**	**34**	**40**	**42**
Germany	11	19	8	5
Spain	7	3	8	0
France	6	3	3	0
United Kingdom	3	3	3	0
Europe gen.	3	0	8	0
North Europe	3	0	8	0
Denmark	2	0	5	5
Holland	2	0	0	0
Greece	1	0	3	6
Italy	1	0	0	5
Malta	1	0	0	0
Norway	1	0	3	5
Belgium	1	3	0	0
Croatia	1	3	0	0
Slovenia	1	3	0	0
OCEANIA: AUSTRALIA	**1**	**3**	**0**	**0**

* Companies were asked to indicate the two main markets, so the sum of values does not add up to 100.

Figure 11 - Source: SRM/Contship

The main countries-trading partners

Istat data on foreign trade[*] help us to better interpret the results of our analysis. Among the top 5 trading partners in Lombardy are Germany, France, China, the Netherlands and the United States. It is clear that while maritime transport prevails with China and the United States, road transport prevails for European countries. With the exception of the United States, for the other countries mentioned, the import component prevails over the export component. Veneto's main trading partners are Germany, France, China, and the United States, and Spain. Unlike Lombardy, export prevails over import with respect to all countries except China and Germany. The situation is similar for Emilia Romagna.

Lombardy's main trade partners

Data referring to 2018; values in billions of euros

	Import	Export	Trade	% World
Germany	26.1	16.7	42.8	17.4
France	12.9	11.9	24.8	10.0
China	13.1	4.3	17.4	7.1
Netherlands	11.2	3.0	14.2	5.8
United States	2.7	9.9	12.6	5.1
Spain	5.6	7.0	12.6	5.1
Svizzera	4.0	6.8	10.8	4.4
United Kingdom	3.6	5.1	8.7	3.5
Belgium	5.8	2.5	8.2	3.3
Poland	2.8	3.9	6.8	2.7
World	*123.3*	*123.2*	*246.5*	*100.0*

Table 2 - Source: SRM/Contship on Istat

Veneto's main trade partners

Data referring to 2018; values in billions of euros

	Import	Export	Trade	% World
Germany	11.2	7.9	19.1	18.5
France	2.3	6.3	8.6	8.4
United States	0.7	5.1	5.8	5.6
China	4.0	1.6	5.6	5.4
Spain	2.0	3.0	5.0	4.8
United Kingdom	0.7	3.6	4.2	4.1
Romania	1.6	1.6	3.2	3.2
Austria	1.6	1.6	3.2	3.1
Netherlands	1.7	1.4	3.2	3.1
Poland	1.0	1.8	2.9	2.8
World	*42,0*	*61,1*	*103,1*	*100,0*

Table 3 - Source: SRM/Contship on Istat

[*] The data refer to the import and export of manufacturing products net of the energy component.

Emilia Romagna's main trade partners

Data referring to 2018; values in billions of euros

	Import	Export	Trade	% World
Germany	5.9	7.6	13.6	14.3
France	2.7	6.7	9.5	10.0
United States	0.8	6.2	7.0	7.4
United Kingdom	1.2	4.2	5.4	5.7
China	3.5	1.9	5.4	5.7
Spain	1.9	3.0	4.9	5.1
Netherlands	1.7	1.6	3.3	3.5
Belgium	1.7	1.4	3.2	3.3
Poland	0.9	1.9	2.8	3.0
Austria	1.0	1.4	2.4	2.5
World	*33.5*	*61.6*	*95.1*	*100.0*

Table 4 - Source: SRM/Contship on Istat

The port of origin and destination is not always known to companies

The data on ports of arrival (exports) and departure (imports) confirm what emerged last year: almost 70% of the enterprises (52% in the 2018 survey), when selling goods abroad, do not know the logistical route they take and in particular do not know the port of arrival of the goods sold.

This result is also partly due to the widespread use of the clause Ex Works in foreign trade relations (which we will discuss in more detail in the next chapter).

In imports, 45% of companies do not know the port from which the goods leave.

Both data can be interpreted in a negative way, in the sense that they are the result of a bad communicative and operational connection between manufacturing and logistics companies.

Main export ports of call

% of companies which indicated the port - two preferences[*]

PORTS (FIRST + SECOND COUNTRY FOR EXPORT)	TOTAL %	LOMBARDY %	VENETO %	EMILIA ROMAGNA %
ASIA	**13**	**11**	**16**	**11**
Shanghai	6	6	7	3
Gedda	1	1	2	0
Chittagong	1	1	2	0
Hong Kong	1	1	2	0
Mumbai	1	0	2	1
St.Pietroburgo	1	0	2	3
AMERICA	**5**	**2**	**7**	**6**
North America	4	1	7	6
New York	2	0	5	3
Vancouver	1	0	1	1
Latin America	1	2	2	0
EUROPE	**19**	**19**	**21**	**16**
Hamburg	7	9	7	1
Marseille	6	8	5	6
Barcelona	6	9	5	4
Istanbul	1	0	1	1
Manchester	1	0	1	4
Rotterdam	1	0	2	0
Antwerp	1	0	2	0
Dover	1	1	1	0
AFRICA	**0**	**1**	**0**	**0**
Casablanca	0	1	0	0
OCEANIA: Melbourne	**0**	**0**	**0**	**0**
Sidney	1	2	0	0
Auckland	1	2	0	0
NO PORT SPECIFIED	**69**	**67**	**68**	**76**

[*] As a multiple choice question, the sum of the values does not amount to 100.

Figure 12 - Source: SRM/Contship

Main ports of origin for imports

% of companies which indicated the port - two preferences[*]

PORTS (FIRST + SECOND COUNTRY FOR IMPORTS)	TOTAL %	LOMBARDY %	VENETO %	EMILIA ROMAGNA %
ASIA	**23**	**22**	**15**	**30**
Shanghai	9	13	5	9
Tokyo	8	0	10	12
Busan	2	0	0	5
Hong Kong	2	3	0	2
Chennay	2	0	0	5
New Delhi	2	6	0	0
Chittagong	1	3	0	0
Ashdod	1	3	0	0
St.Pietroburgo	1	0	0	2
Da Nang	1	3	0	0
AMERICA	**7**	**0**	**10**	**9**
North America	7	0	10	9
New York	5	0	10	5
Los Angeles	1	0	0	2
Montreal	1	0	0	2
EUROPA	**30**	**28**	**30**	**30**
Hamburg	10	19	5	7
Rotterdam	8	0	10	12
Marseille	6	3	3	12
Barcelona	3	3	5	0
Istanbul	3	3	3	2
London	2	0	3	2
Bergen	1	0	3	0
Copenaghen	1	0	3	0
AFRICA	**0**	**0**	**0**	**0**
OCEANIA: Sidney	**1**	**3**	**0**	**0**
NO PORT SPECIFIED	**45**	**44**	**58**	**35**

[*] As a multiple choice question, the sum of the values does not amount to 100.

Figure 13 - Source: SRM/Contship

Logistics process management

The tendency to outsource logistics is reconfirmed

In the previous chapter we focused on the "where", i.e. the journey that the goods make to get to our companies (in the case of import) or to reach the destination (in the case of export). Now the focus shifts to "how", i.e. how the logistic process is managed. We then asked the companies in our sample whether or not outsourcing the logistics process prevails.

Tendency to outsource logistics

% of companies that have stated that they outsource the logistics process

EXPORTS

TOTAL
- 85%
- 69%

LOMBARDY
- 83%
- 70%

VENETO
- 87%
- 71%

EMILIA ROMAGNA
- 86%
- 66%

IMPORTS

TOTAL
- 71%
- 49%

LOMBARDY
- 77%
- 72%

VENETO
- 73%
- 45%

EMILIA ROMAGNA
- 63%
- 35%
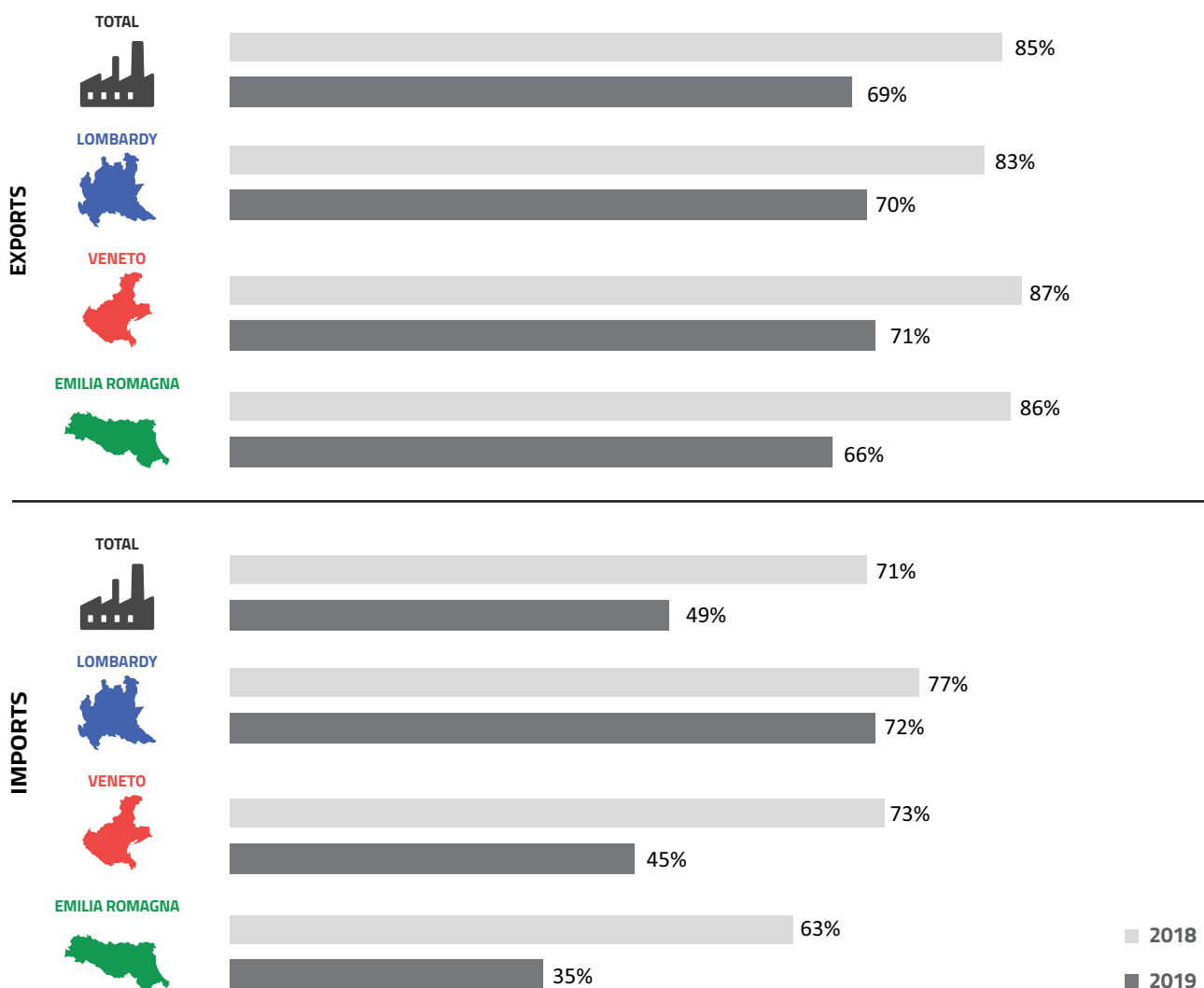
■ 2018
■ 2019

Figure 14 - Source: SRM/Contship

The results confirm (albeit with lower percentages compared to the 2018 survey) the general tendency of companies to outsource the logistics process (69% of exporting companies and 49% of importing companies)

As regards exports, there are no major regional differences and in all three regions the percentage of companies that outsource the logistics process exceeds 65%. With respect to imports, the percentage of companies in Emilia Romagna that outsource is less than in other Regions. Outsourcing brings several economic advantages: the reduction of operating costs, better use of stock in warehouses and, in general, better competitiveness on the market. But the greatest advantage is the absence of capital invested in buildings, installations, facilities and personnel, thus reducing a fixed cost that becomes variable, albeit to a certain extent. Outsourcing the logistics of goods is a positive choice as long as manufacturing companies are able to maintain a dialogue with logistics operators in order to optimize and better manage the entire supply chain.

Outsourcing of logistics related to the export of goods

% of companies

	TOTAL	LOMBARDY	VENETO	EMILIA ROMAGNA
	%	%	%	%
OUTSOURCED	69	71	66	70
NOT OUTSOURCED	31	29	34	30
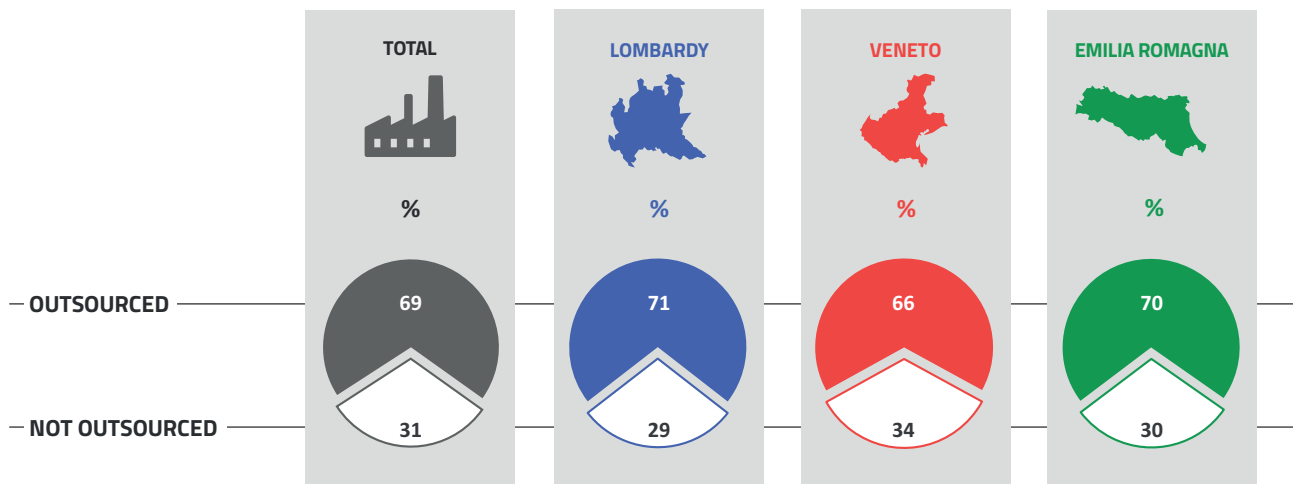
Figure 15A - Source: SRM/Contship

Outsourcing of logistics related to the import of goods

% of companies

	TOTAL	LOMBARDY	VENETO	EMILIA ROMAGNA
	%	%	%	%
OUTSOURCED	49	72	45	35
NOT OUTSOURCED	51	28	55	65
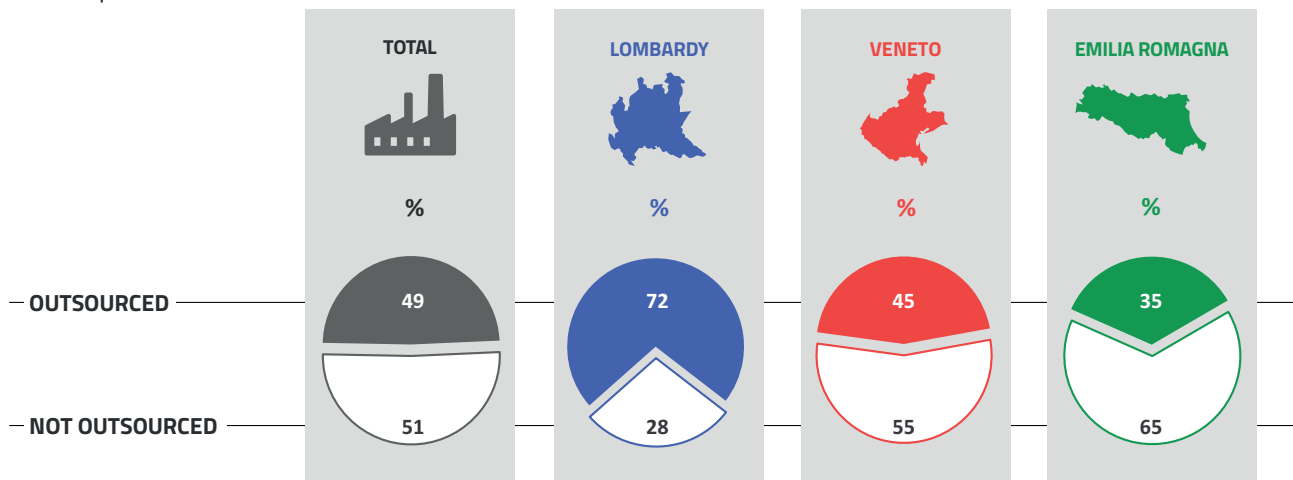
Figure 15B - Source: SRM/Contship

Stable data on Incoterms that see the clause "Ex Works" as the prevailing type in export

An important topic to consider is the choice of contractual terms (Incoterms). These determine the party (seller or buyer) who bears the costs and/or risks of transport. The set of terms beginning with the letter "E" or "F" indicate costs and risks borne by the buyer, those beginning with the letter "C" indicate transport costs borne by the seller and risk borne by the buyer, while those beginning with "D" indicate costs and risks of transport borne by the seller. As part of our analysis, we asked companies what contractual terms they favour in their dealings with foreign countries. The results of this survey confirm what already emerged in 2018,

i.e. a marked tendency to use the clause "delivered Ex Works" in the case of exports: 67% of enterprises use it (64% in the 2018 survey). So, the Italian company totally cedes the cost and risk of the transport to the buyer.

The clause "Ex Works" is the least demanding and least expensive for the seller. The seller does not need to oversee the loading of the goods using the carrier chosen by the buyer and is not required to bear the costs for export customs clearance. The risk of the loss of the goods lies entirely with the buyer from the moment of hand over. The seller fulfils their obligations simply by placing the goods, packed and made available to the buyer, in the place indicated (generally its own factory and/or warehouse). 11% more companies are added to the aforementioned 67% of companies that resort to the FOB (Free on Board) terms.

Contractual terms employed mainly for goods

% of companies

	%	LOMBARDY %	VENETO %	EMILIA ROMAGNA %
EXPORTS				
EX WORKS	67	57	70	82
FOB (FREE ON BOARD)	11	13	11	6
CIF (COST, INSURANCE AND FREIGHT)	14	19	10	11
DDP (DELIVERED DUTY PAID)	2	2	2	1
Other Incoterms	1	1	1	0
It is decided by the buyer	5	8	6	0
IMPORTS				
EX WORKS	24	47	2	25
FOB (FREE ON BOARD)	18	19	18	19
CIF (COST, INSURANCE AND FREIGHT)	39	16	40	56
DDP (DELIVERED DUTY PAID)	16	6	40	0
Other Incoterms	0	0	0	0
It is decided by the seller	3	12	0	0

Figure 16 - Source: SRM/Contship

Under these terms, it is established that the risks related to the placement of the goods on board the ship at the port of departure, as well as all related expenses, are borne by the seller. The buyer, on the other hand, assumes the costs and risks relating to the transport of the goods once they have been placed on the ship. Therefore, a tremendous 78% assumes logistic costs and risks up until, and no further than, the shipment of the goods. Some differences emerge at a regional level: Ex Works is the most used by 82% of companies in Emilia Romagna, 70% in Veneto and 57% in Lombardy. For imports, the percentage of Italian companies purchasing under Ex Works is much lower (24% of companies, down from 46% in 2018). Here, too, there is a tendency to transfer transport costs and responsibilities to the foreign counterpart.

Given the extensive use of the Ex Works in the case of exports, it was decided to ask the companies the underlying reasons for this choice. The answer is very clear, with 62% of companies stating that they consider it an effective way of "keeping the price low", thus avoiding integrating, into the offer, the transport costs to the destination. In this regard, a strategic consideration is made on the fact that logistics and transport processes are considered a "cost" and not a "value", due to the competitiveness of the product itself. This is an issue that will need to be dealt with by the industry and the main associations of logistics operators who will be called upon to make a very important commitment in terms of communication and enhancement in the future.

Why Ex Works?

% di imprese

	%	LOMBARDY %	VENETO %	EMILIA ROMAGNA %
EXPORTS Keep prices low	62	75	55	59
Surrender logistics and customs risks	29	40	8	46
We don't want /we're not able to bring the goods to their destination	29	8	65	5
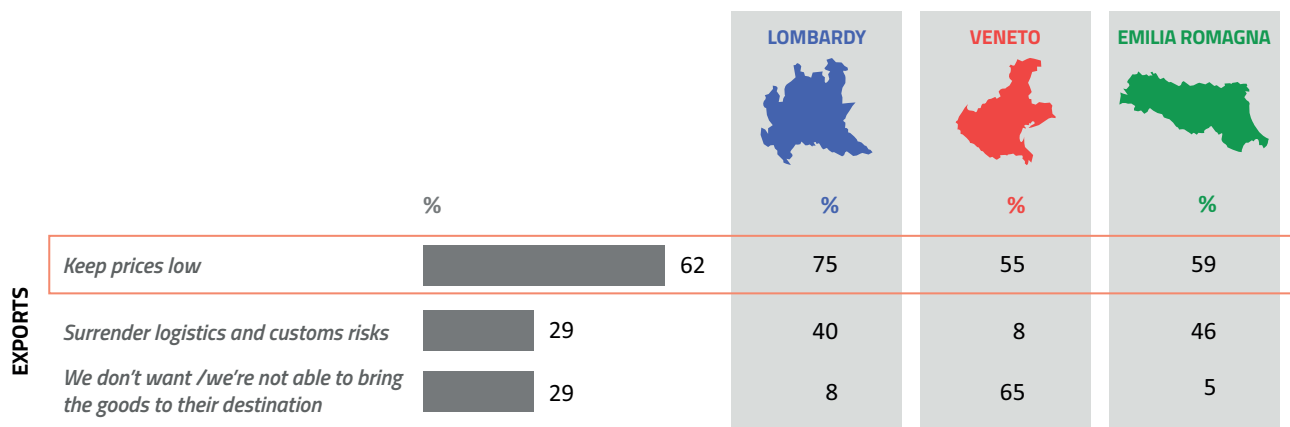
Figure 17 - Source: SRM/Contship

SOME INCOTERMS

Ex Works:
costs fully borne by the buyer

FOB (Free On Board):
costs borne by the seller up until loading the goods onto the ship at the port of departure

CIF (Cost, Insurance and Freight):
costs to be borne by the seller until arrival at the port of destination + insurance

DDP (Delivered Duty Paid):
costs to be borne by the seller until the arrival of the goods at destination + Insurance + Customs import + Import Taxes

The demand for sustainability in logistics by manufacturing companies

Companies were asked a series of questions to assess their approach to sustainability. The main elements that emerged from the investigation are discussed below.

We all start out sustainable

One of the first elements to be analysed was to understand the value of sustainability for companies and how that represents an important part of the developmental process, also at the organisational level. Only 16% of the companies interviewed stated that they manage the issue of sustainability through a specific model of internal governance and engagement with stakeholders.

The following result is very interesting: of the mentioned 16%, more than half have done it since the company was born, therefore, sustainability has been an important asset since the companies were created.

A careful choice of materials and packaging, especially in Veneto and Emilia Romagna, represent the sustainability factor which is most pursued by companies. The energy factor is taken less into account.

Where in the previous question, companies were asked whether or not they include sustainability as part of their governance, in this case they were asked whether they use Key Performance Indicators (KPIs) to improve sustainability and if so, what are these KPIs.

The answer to this question confirms what emerged from the previous question, so there are still few companies that deal with the issue of sustainability in a systematic and organised way. In fact, only 8% of the sample uses parameters related to environmental sustainability. As a result, many manufacturing companies have not yet understood how strategic the issue of sustainability is for companies, underestimating, among other things, that for legislative, market and cultural reasons, sustainability could become an indispensable condition for companies to operate in the future.

The survey went beyond the purpose of quantifying the phenomenon of sustainability of enterprises, trying also, to some extent, to "qualify" it. The 8% were then asked about the main KPIs used and it turned out that as many as 50% of companies consider "the choice of materials and the sustainability of packaging" among the main performance indicators. In Veneto and Emilia Romagna this reaches (in the first case) and surpasses (in the second) 60%. The energy consumption factor is used less: 9% use energy savings among their KPIs.

Sustainability as part of internal governance system

% of manufacturing companies that include sustainability in their internal governance elements

SINCE THE COMPANY WAS BORN	10%
FROM 1 TO 5 YEARS	5%
FROM 1 YEAR	1%
NO	84%

16%
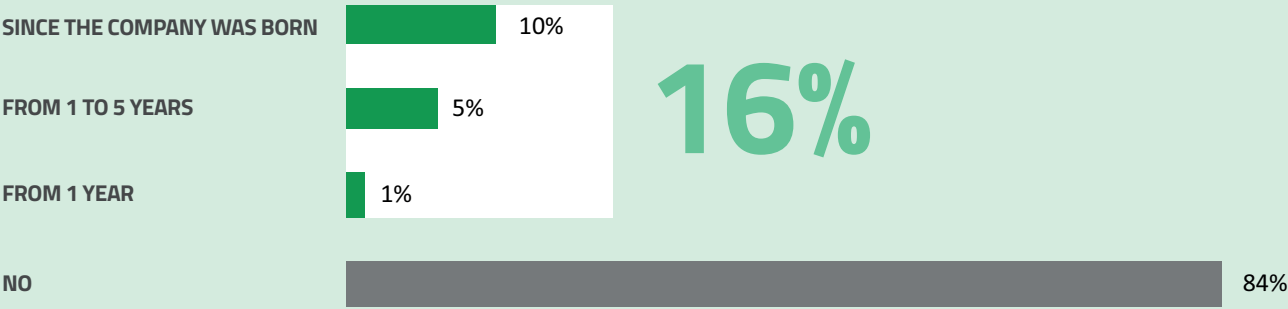
Figure 18 - Source: SRM/Contship

KPIs used by companies that include environmental sustainability as part of their internal governance system

% of companies using the KPI

CHOICE OF MATERIALS/PACKAGING	50%
CERTIFICATIONS/PROTOCOLS (RSPO-FSC)	16%
ORGANIC PRODUCTS	16%
ENERGY CONSERVATION	9%
CHOICE OF FUEL	9%
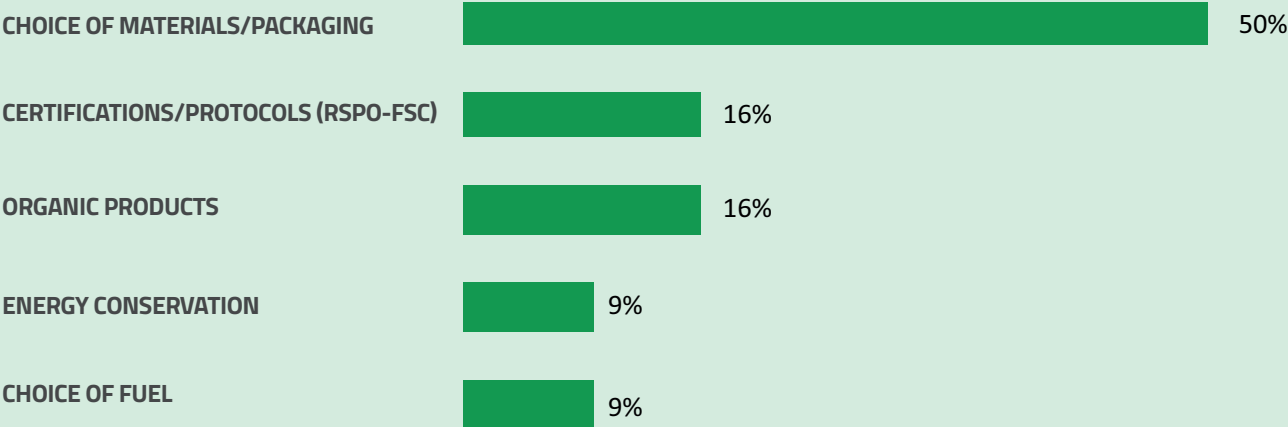
Figure 19 - Source: SRM/Contship

Companies say the demand for sustainability over the next two years is to grow. More sensitivity in Lombardy

In the previous pages we have framed how sustainability is considered and treated by manufacturing companies (sustainability supply); we now see what the demand for sustainability from customers and end consumers is like, as perceived by the manufacturing companies interviewed. Companies were asked to indicate on a scale of 0 to 10, to what degree they consider their customers to be sensitive to re-cognising the added value of sustainability (environmental, social and economic). 18% of the sample believe that customers are highly sensitive to the issue of environmental sustainability. This percentage rises to 36% if the question is asked with respect to the next two years.

In Lombardy, several companies believe that sustainability is becoming a collective priority: 28% of the sample claims that customers are highly sensitive to sustainability. The percentage rises to 48% if the discussion is carried out in relation to the next two years.

Customer sensitivity to the issue of sustainability

% of companies that consider customers to be highly sensitive – *Top 2 boxes** on a scale of 1 to 10.

	%	LOMBARDY %	VENETO %	EMILIA ROMAGNA %
TOP 2 BOXES				
ENVIRONMENTAL SUSTAINABILITY	18	28	13	11
SOCIAL SUSTAINABILITY	18	31	6	15
ECONOMIC SUSTAINABILITY	9	10	8	10
NEXT TWO YEARS				
ENVIRONMENTAL SUSTAINABILITY	34	48	31	19
SOCIAL SUSTAINABILITY	33	51	24	19
ECONOMIC SUSTAINABILITY	29	40	25	19
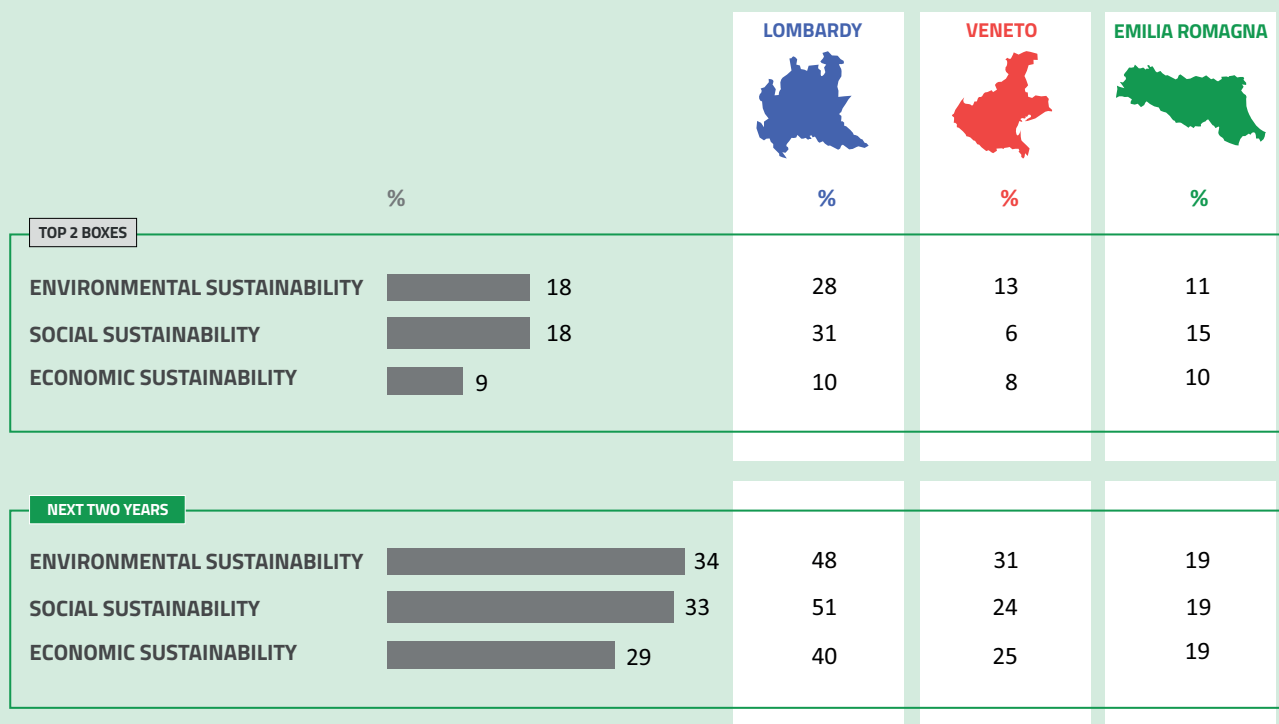
* *Top 2 boxes*: percentage of companies that voted 9 or 10.

Figure 20 - Source: SRM/Contship

Few companies have sustainable logistics projects underway

Although companies feel that there will be a growth in consumer demand for sustainability, this still does not encourage them to invest adequately into this competitiveness driver. In fact, only 4% of companies claim to have ongoing projects to improve sustainability in the field of logistics and transport. A response to this can be found in a public policy that is still not very sensitive to the issue of sustainability. Again, more than 53% of this is mainly related to materials and packaging.

To complement these reflections, we will also mention the research carried out in 2018 by SOS-LOGistica (Association for Sustainable Logistics) in collaboration with Bicocca University and Federconsumatori whose results were presented at the conference "Sustainable Customer, Sustainable Logistics: changing the paradigm between cost and value" in Turin in November 2018 by the research coordinator, Prof. Luca Vecchio, whose slides are available at the following link:

http://www.sos-logistica.org/wp-content/uploads/2018/11/1_Luca-Vecchio_UniBicocca.pdf

Logistical challenges and Quality Logistics Italian Index

"Rapidity and regularity of port services" remains one of the most important variables for enterprises

The main object of this chapter is the *Quality Logistics Italian Index (QLI²)*, an indicator developed by SRM and Contship that allows you to immediately assess how Italian manufacturing companies assess their reference logistics system. This indicator (which is in relation to levels of satisfaction) was accompanied by an opinion on how important these companies believe each of the variables, used to calculate the QLI², to be.

12 variables have been chosen belonging to the Services, Costs, Infrastructures, and Sustainability categories which can affect the satisfaction of manufacturing companies with regard to the logistics system they use.

Importance of the logistics system

Average assessment on a scale from 1 to 10 with respect to 12 variables

Speed and regularity of maritime transport services	8.49
Speed and regularity of land transport services	8.46
Rapidity and regularity of port services (loading/unloading of goods/controls)	8.45
Fast and efficient customs services	8.4
Services	**8.45**
Port service costs (stops, THC-Terminal Handling Charge, etc.)	8.48
Costs of the transport service between the port and the inland destination	8.4
Costs	**8.44**
Attention to environmental sustainability issues	8.44
Attention to social sustainability issues	8.38
Attention to issues of economic sustainability	8.39
Sustainability	**8.43**
IT system	8.46
Size and accessibility of infrastructures	8.44
Availability of high-speed rail services	8.11
Infrastructures	**8.28**
Average Importance	**8.41**

Table 5 - Source: SRM/Contship

Respondents were asked to give a score from 1 to 10 in relation to the importance of each of these variables in determining the overall efficiency of the logistics system. The average importance attributed to logistical factors remains quite high (8.4 on a scale of 1 to 10; vs. 8.8 in 2018). Our panel gave slightly greater importance to the service and cost variables.

Importance of the logistics system: trend

Satisfaction on a scale from 1 to 10 with respect to 12 variables

AVERAGE IMPORTANCE	8.65 (2018) / 8.41 (2019) ↓
SERVICES	8.95 (2018) / 8.45 (2019) ↓
COSTS	8.89 (2018) / 8.44 (2019) ↓
SUSTAINABILITY	8.43 (2018) / 8.43 (2019) −
INFRASTRUCTURES	8.15 (2018) / 8.28 (2019) ↑
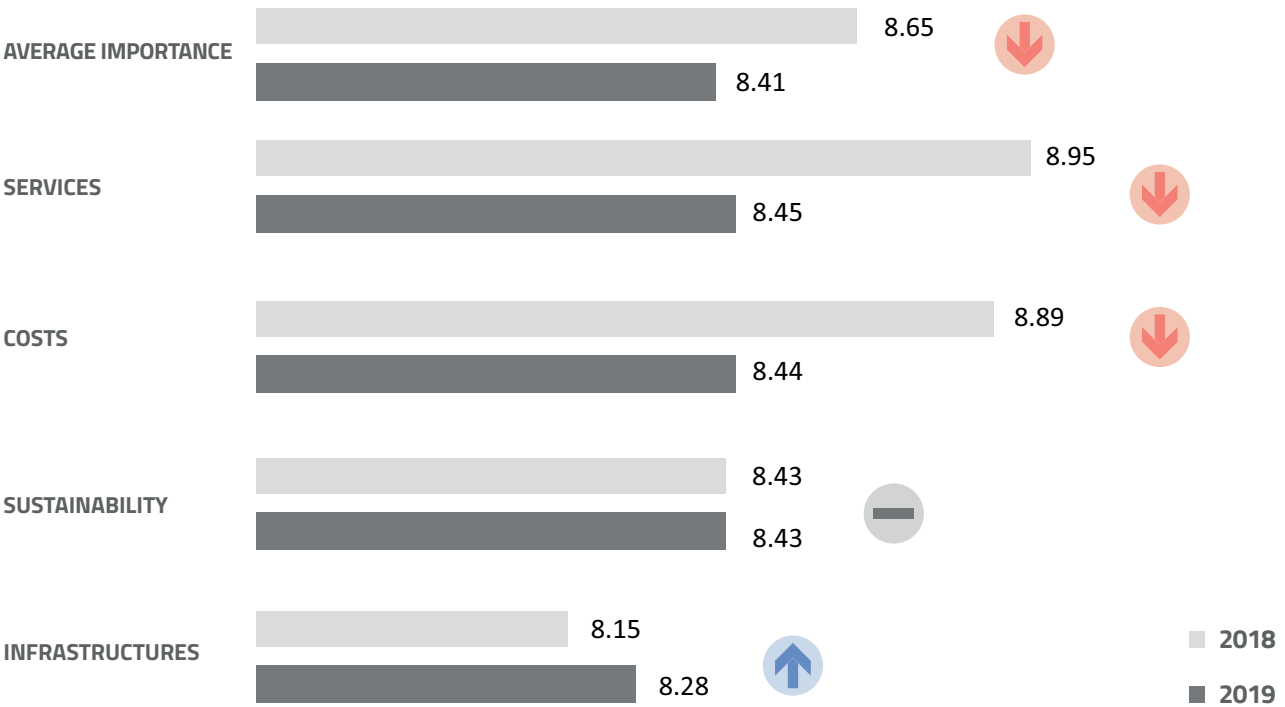
2018
2019

Figure 21 - Source: SRM/Contship

Differences emerge at regional level.
In confirmation of what was observed in the 2018 survey, the companies operating in Lombardy show a gap between the maximum and the minimum value, but still give, on average, greater importance to almost all the variables (values between 7.95 and 8.88; average importance of 8.70).

As regards Emilia Romagna, the range is lower, but even here the importance attributed to each variable is quite high (values between 8.32 and 8.5, average importance equal to 8.38). For Veneto, this goes from a minimum value of 7.93 to a maximum of 8.31 (average importance of 8.38).

Average rating on a scale of 1 to 10 and *Top 2 boxes.*[*]

	LOMBARDY	VENETO	EMILIA ROMAGNA	TOTAL
Speed and regularity of maritime transport services	8.79	8.31	8.33	8.49
Size and accessibility of infrastructures	8.79	8.10	8.45	8.44
Rapidity and regularity of port services	8.79	8.09	8.47	8.45
Port service costs	8.75	8.21	8.50	8.48
Attention to social sustainability issues	8.78	8.01	8.32	8.38
Speed and regularity of land transport services	8.78	8.17	8.42	8.46
IT system	8.88	8.09	8.37	8.46
Costs of the transport service between the port and the inland destination	8.70	8.15	8.34	8.40
Attention to environmental sustainability issues	8.67	8.29	8.33	8.44
Attention to social sustainability issues	8.85	7.93	8.37	8.39
Fast and efficient customs services	8.67	8.15	8.39	8.40
Availability of high-speed rail services	7.95	8.14	8.29	8.11
Average importance	**8.70**	**8.14**	**8.38**	**8.41**

[*] *Top 2 boxes*: percentage of companies that voted 9 or 10.

Figure 22 - Source: SRM/Contship

The gap between levels of satisfaction and importance is preserved

In addition to the level of importance, the survey examines the degree of satisfaction that the respondent attributes to each variable with regard to the logistics of the 2 most used ports. The differences that emerged in the 2019 survey compared to the 2018 survey are discussed below:

1. Greater homogeneity in responses. Satisfaction levels cover a range from 7.46 (Availability of highspeed rail services) to 7.67 (Rapidity and regularity of maritime transport services).

2. The average satisfaction index (*Quality Logistics Italian Index* – QLI[2]) is 7.59 for the three regions (satisfaction level: more than sufficient), slightly higher than in 2018.

If we compare it with the average importance assigned to variables (8.4), it is evident that there is a gap between satisfaction and importance of the logistic system that needs to be bridged.

As far as the individual three regions are concerned, satisfaction levels are rather homogeneous: the *Quality Logistics Italian Index* is 7.8 for Lombardy, 7.18 for Veneto, and 7.92 for Emilia Romagna. As regards Lombardy, satisfaction levels cover a range from 7.49 (for land transport costs) to 7.9 (for accessibility to infrastructure). For Veneto, the level of satisfaction ranges from 7.08 (for the speed and regularity of maritime services) to 7.27 (for port service costs). Finally, in the Emilia Romagna region, it ranged from 7.84 for the attention to sustainability issues to 7.97 for the efficiency of customs services.

Quality Logistics Italian Index (QLI²): trend

Average level of satisfaction on a scale from 1 to 10 with respect to 12 variables

QLI²
- 7.38
- 7.59

COSTS
- 7.35
- 7.64

SERVICES
- 7.55
- 7.59

SUSTAINABILITY
- 7.3
- 7.58

INFRASTRUCTURES
- 7.23
- 7.54

■ 2018
■ 2019
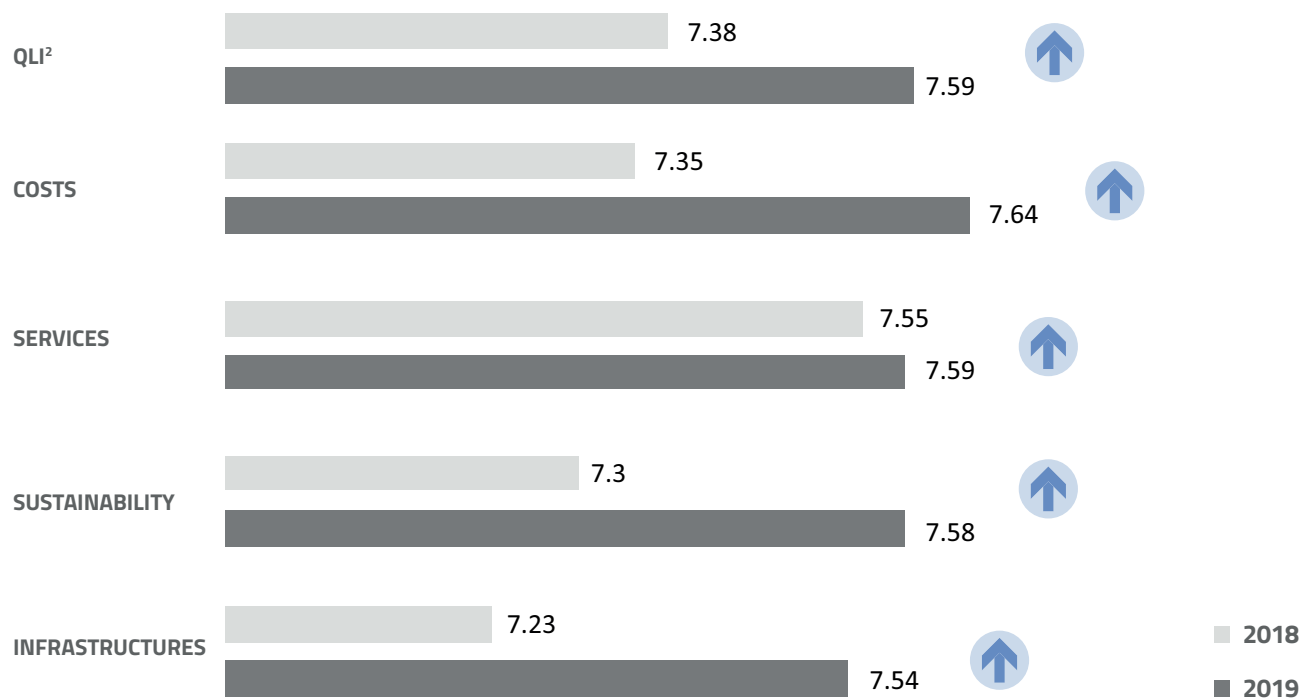
Figure 23 - Source: SRM/Contship

QLI² and level of importance: a gap to bridge

Average level of satisfaction on a scale from 1 to 10 with respect to 12 variables

TOTAL
- 8.41
- 7.59

LOMBARDY
- 8.7
- 7.8

VENETO
- 8.14
- 7.18

EMILIA ROMAGNA
- 8.38
- 7.92

■ AVERAGE IMPORTANCE
■ QLI²
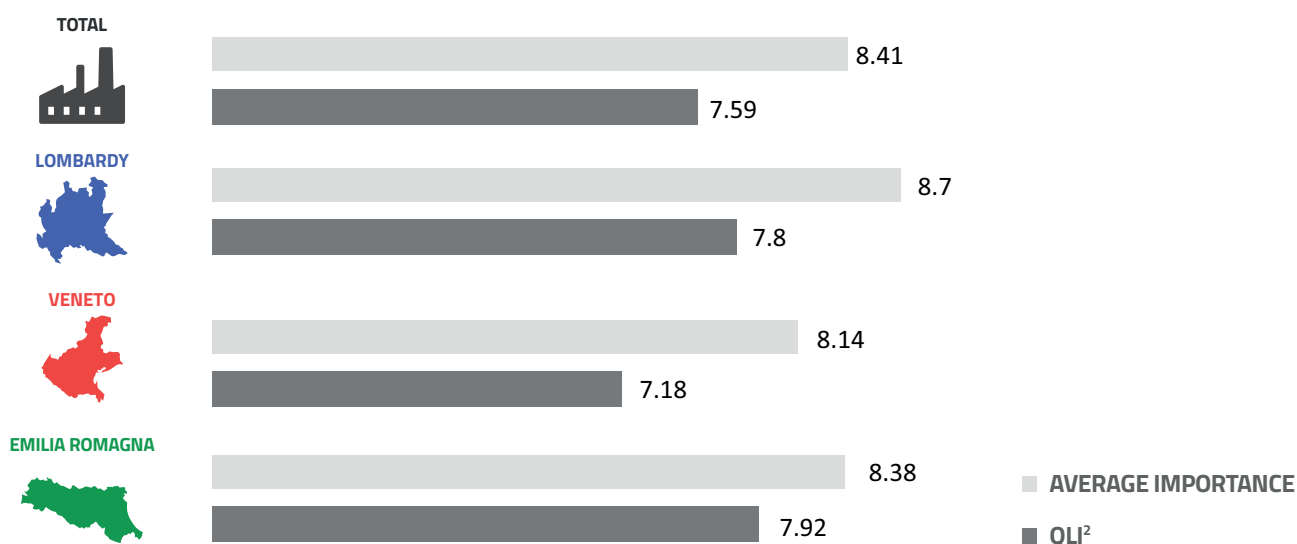
Figure 24 - Source: SRM/Contship

Satisfaction with the logistics system and Quality Logistics Italian Index

Satisfaction on a scale from 1 to 10 with respect to 12 variables.

Port service costs (stops, THC-Terminal Handling Charge, etc.)	7.65
Costs of the transport service between the port and the inland destination	7.63
Costs	**7.64**
Speed and regularity of land transport services	7.61
Fast and efficient customs services	7.61
Speed and regularity of maritime transport services	7.60
Rapidity and regularity of port services (loading/unloading of goods/controls)	7.55
Services	**7.59**
Attention to social sustainability issues	7.59
Attention to issues of economic sustainability	7.56
Attention to environmental sustainability issues	7.54
Sustainability	**7.58**
Size and accessibility of infrastructures	7.67
IT system	7.61
Availability of high-speed rail services	7.46
Infrastructures	**7.54**
Quality Logistics Italian Index	**7.59**

Table 6 - Source: SRM/Contship

The port remains a priority

By cross-referencing the data on the degree of importance and average satisfaction, it is possible to draw some guidelines and policies, identifying in particular the variables that prioritise intervention. In particular, with this type of analysis that we have defined with the name of "Strength/priority analysis", it is possible to classify the variables identified in four quadrants:

I) Strengths: in the top right corner, we can see the variables considered, by operators, to be of above average in terms of importance and satisfaction. These are, therefore, advantages for the reference logistics system.

QLI[2] and satisfaction with the logistics system in the three regions

Satisfaction on a scale from 1 to 10 with respect to 12 reference variables and *Top 3 boxes.*[*]

	LOMBARDY	VENETO	EMILIA ROMAGNA	TOTAL
Port service costs	7.89	7.27	7.96	7.67
Size and accessibility of infrastructures	7.90	7.12	7.91	7.61
Costs of the transport service between the port and the inland destination	7.49	7.17	7.90	7.46
Attention to social sustainability issues	7.82	7.20	7.95	7.61
Speed and regularity of maritime transport services	7.77	7.08	7.94	7.54
Fast and efficient customs services	7.86	7.25	7.97	7.65
Speed and regularity of land transport services	7.83	7.23	7.96	7.63
IT system	7.76	7.17	7.90	7.56
Attention to social sustainability issues	7.81	7.12	7.84	7.55
Rapidity and regularity of port services	7.83	7.16	7.94	7.60
Attention to environmental sustainability issues	7.89	7.19	7.84	7.61
Availability of high-speed rail services	7.80	7.18	7.91	7.59
QLI[2]	**7.80**	**7.18**	**7.92**	**7.59**

[*] *Top 3 boxes*: percentage of companies that gave the variable an 8, 9 or 10.

Figure 25 - Source: SRM/Contship

II) Priority interventions: in the upper left corner, we can see the variables that are considered to be of average importance, but for which satisfaction levels are below average. In such cases, action is needed to improve the level of satisfaction.

III) Secondary interventions: in the lower left corner, we can see variables for which both importance and satisfaction levels are below average. In this case we need interventions to increase satisfaction, but these are less important than the variables in the second quadrant.

IV) Potential: in the lower right corner, we can see variables for which importance is below average, but satisfaction is above average.

With reference to the whole sample, it appears that the speed and regularity of services are considered to be among the priority interventions. It is interesting to consider the subdivision of the theme of sustainability indicating a demand for greater attention to environmental sustainability (lower average satisfaction), while a relatively higher satisfaction is indicated for social sustainability. The figure also highlights some elements of strength, but in this case it is good to remember that we are still in a context characterised by a gap between "satisfaction" and "importance" in relation to the reference variable, so interventions are also necessary in

Priority interventions, strengths and secondary interventions (total companies)

*Top 2 boxes** and *Top 3 boxes***.

PRIORITY INTERVENTIONS   STRENGTHS

IMPORTANCE *(Top 2 boxes)*

- Speed and regularity of maritime transport services
- Attention to social sustainability issues
- Size and accessibility of infrastructures
- Port service costs
- Rapidity and regularity of port services
- Speed and regularity of land transport services
- IT system
- Attention to environmental sustainability issues
- Attention to issues of economic sustainability
- Costs of the transport service between the port and the inland destination
- Fast and efficient customs services
- Availability of high-speed rail services

SECONDARY INTERVENTIONS   POTENTIAL

SATISFACTION *(Top 3 boxes)*

▲ SERVICES   ⬡ INFRASTRUCTURES
● SUSTAINABILITY   ■ COSTS

* *Top 2 boxes*: percentage of companies that gave a 9 or 10.
** *Top 3 boxes*: percentage of companies that gave the variable an 8, 9 or 10.

Figure 26 - Source: SRM/Contship

these cases, despite that satisfaction is "relatively" higher.

Let us now perform the same type of analysis for the three regions individually.

Lombardy: in this case the prevailing logistics system connects the port of Genoa and La Spezia to the Lombard companies. It presents strengths with regard to social sustainability and its information system, while economic sustainability is among the priority interventions (i.e. where satisfaction is relatively lower, but importance is higher).

Priority interventions, strengths and secondary interventions (Lombardy)

Top 2 boxes* and Top 3 boxes**.
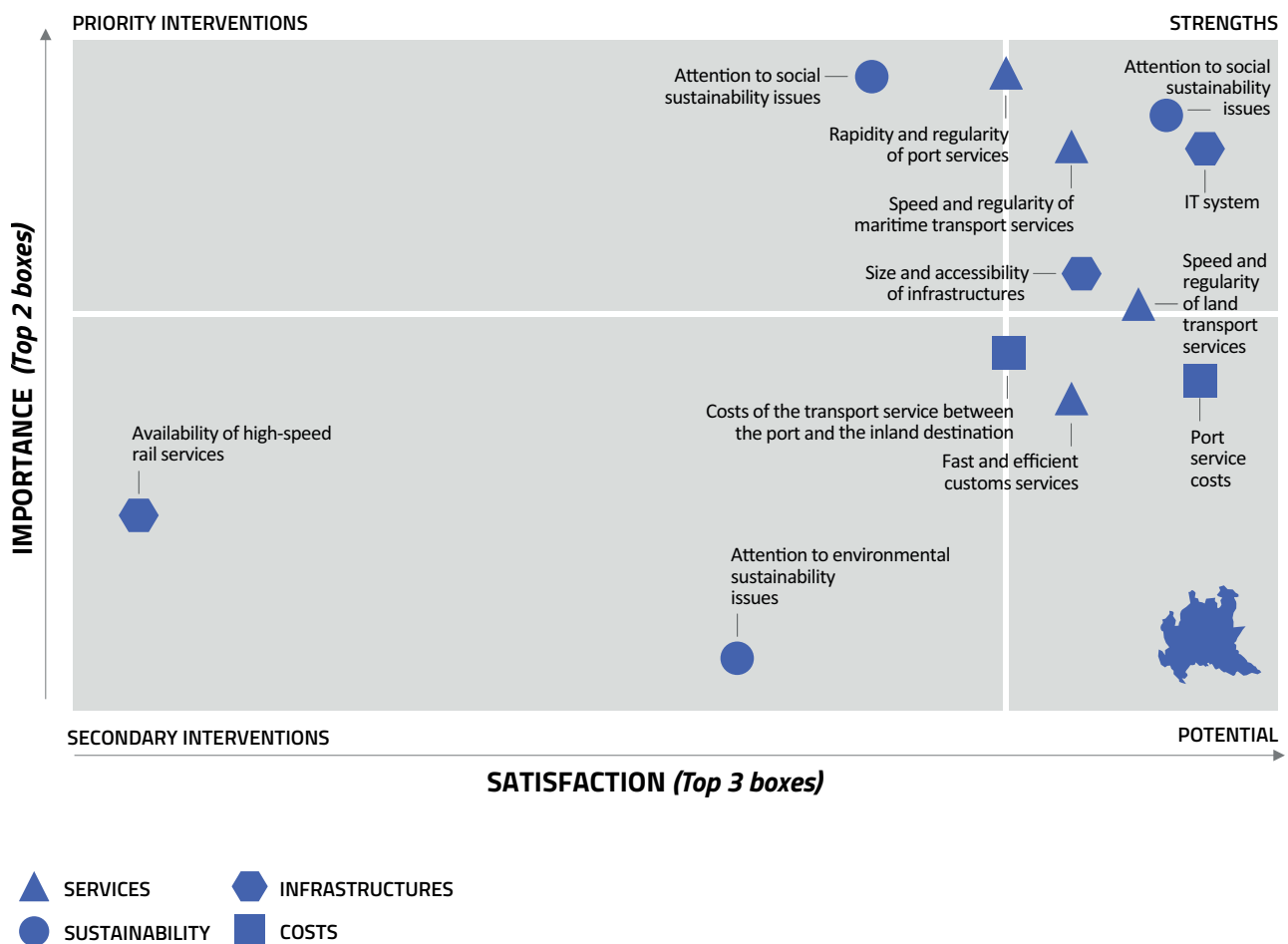
* *Top 2 boxes*: percentage of companies that gave a 9 or 10
** *Top 3 boxes*: percentage of companies that gave the variable an 8, 9 or 10.

Figure 27 - Source: SRM/Contship

Veneto: The logistics system connects the companies based in Veneto mainly to the ports of Venice and Genova. Also with regard to Veneto, strengths include the speed and regularity of the maritime transport services. Improvements of the focus on environmental sustainability are desirable.

Priority interventions, strengths and secondary interventions (Veneto)

Top 2 boxes* and Top 3 boxes**.

Figure 28 - Source: SRM/Contship

Emilia Romagna: The logistics system connects the companies in Emilia-Romagna mainly to the ports of Genoa and La Spezia. Accessibility to infrastructure, land transport costs and port costs are among system's strengths. Priority actions include an improvement in the speed and regularity of land transport services.

Priority interventions, strengths and secondary interventions (Emilia Romagna)

Top 2 boxes* and *Top 3 boxes***.

* *Top 2 boxes*: percentage of companies that gave a 9 or 10
* *Top 3 boxes*: percentage of companies that gave the variable an 8, 9 or 10.

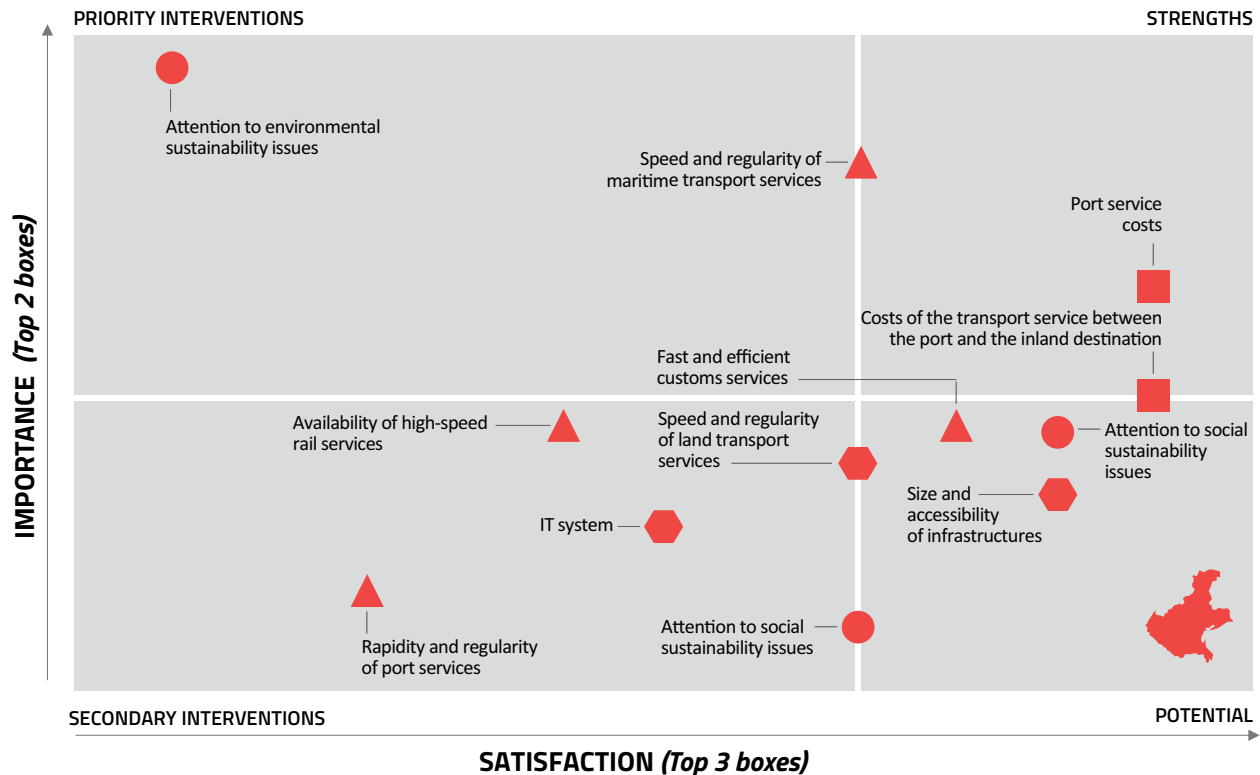Figure 29 - Source: SRM/Contship

The case of the prosecco district of Conegliano Valdobbiadene

Valdobbiadene   **Conegliano**

The main novelty in this year's survey - which will probably also accompany future editions - is the study of the logistical choices of companies belonging to a successful Italian district as identified by Intesa Sanpaolo's Research Department in its publication "Monitor sui Distretti Industriali" (Monitoring Industrial Districts). In this case, given the type of production (typically Italian), and the international performance in recent years, the prosecco district of Conegliano Valdobbiadene, in the province of Treviso, was chosen.

Export by container: in some cases even large volumes

When we talk about districts in the collective imagination, we think of small businesses. Although SMEs are the strong core of each district, the SRM/Contship survey shows that even in these particular economic contexts there are larger companies. In fact, although most of the companies in the district (62%) export no more than 50 containers per year, a good 38% exceed this limit.

Exports are disputed by Venice and Genoa

Differently from that which was found with regard to the Venetian sample, where the port of Venice, although relevant, does not exceed Genoa in the classification of ports preferred by the companies, in this specific case the following 'overtaking' occurred: the port of Venice is used by the majority of the enterprises (62%), while Genoa is among the first two most used ports for 54% of companies.

The road is the most used mode of transport that connects us to ports

Also in this case, road transport is the preferred solution by companies to transport goods from the port to the company and vice versa. More precisely, 77% choose only road transport, and 23% choose intermodal transport. For 100% of the companies, the factors motivating the choice of intermodal transport are due to the convenience and frequency of the service.

Wine and export

Conegliano Valdobbiadene Prosecco DOCG wines are obtained from the grapes of the Glera vine and, up to a maximum of 15% are from the Verdiso, Bianchetta trevigiana, Perera and Glera lunga varieties. In this area, vineyards have been cultivated since ancient times, with written evidence dating back to the sixth century and, even later, to the time of the Venetian Republic.

Conegliano Valdobbiadene Prosecco DOCG includes the following wines:

• Conegliano Valdobbiadene Prosecco
• Conegliano Valdobbiadene Prosecco frizzante
• Conegliano Valdobbiadene Prosecco spumante superiore

It is evident that the district has strengthened its position in international markets over the last year and, more generally, over the last ten years from the publication "Monitor dei distretti" edited by Intesa Sanpaolo's Studies and Research Department. In 2018 exports in the first nine months increased by about 50 million euros (+10.9%), reaching 536 million exports. Compared to the figure recorded in 2008 (182 million euros), the district's exports almost tripled. The 2018 total also showed an 8% growth in exports, which reached almost 750 million.

The 20 districts with the highest export growth (in value) in the first nine months of 2018

Cumulative values in millions of euro and % trend change

	Q3 2017	Q3 2018	Difference	Change %
Metals, Brescia	2,541.10	2,885.80	344.7	13.6
Leather goods and footwear,	2,772.00	3,093.70	321.6	11.6
Florence Taps, valves and cookware, Lumezzane	2,458.70	2,641.20	182.5	7.4
Wines from the Langhe, Roero and Monferrato Regions	951.9	1,109.10	157.1	16.5
Papermaking, Capannori	805.8	937.6	131.9	16.4
Packaging machines, Bologna	1,706.70	1,831.80	125.1	7.3
Mechatronics, Trento	804.8	911.4	106.6	13.2
Instrumental mechanics, Bergamo	1,770.90	1,862.40	91.5	5.2
Scaligera thermomechanics	1,083.20	1,164.70	81.5	7.5
Mechatronics, Alto Adige	1,012.50	1,082.70	70.2	6.9
Furniture from Lienza and the Piave District	1,838.90	1,901.90	63	3.4
Instrumental mechanics, Vicenza	1,691.20	1,752.30	61.1	3.6
Metalworking, Arno Valley	377.8	438	60.2	15.9
Plastics from Treviso, Vicenza, Padua	1,108.30	1,167.40	59.1	5.3
Wood and furniture, Brianza	1,407.00	1,465.60	58.6	4.2
Thermomechanics, Padua	789.8	846	56.2	7.1
Metal mechanics, Lecco	1,865.60	1,920.80	55.2	3
Brenta Footwear	619.1	673.5	54.4	8.8
Prosecco from Conegliano-Valdobbiadene	483.2	535.6	52.4	10.9
Textiles, Biella	1,014.60	1,064.80	50.3	5
Mechatronics, Bari	949	999.1	50.1	5.3

Table 2 - Source: Intesa Sanpaolo on Istat

The 20 districts with the highest export growth (in value) compared to 2008

Cumulative values in millions of euro and % variant

	Q3 2008	Q3 2018	Differenza	Var.%
Leather goods and footwear, Florence	1,408	3,094	1,686	119.11
Goldsmiths, Valenza	418	1,517	1,099	262.11
Eyewear, Belluno	1,174	2,048	874	74.8
Tanning, Arzignano	1,177	1,725	548	46.1
Packaging machines, Bologna	1,319	1,832	513	38.13
Wines from the Langhe, Roero and Monferrato Regions	621	1,109	488	78.11
Mechatronics, Alto Adige	608	1,083	475	78.5
Tiles, Sassuolo	2,150	2,539	389	18.5
Instrumental mechanics, Bergamo	1,479	1,862	384	25.13
Mechatronics, Bari	627	999	372	59.7
Plastics from Treviso, Vicenza, Padua	796	1,167	371	46.1
Prosecco from Conegliano-Valdobbiadene	182	536	354	194.5
Papermaking, Capannori	594	938	344	57.12
Goldsmiths, Arezzo	1,051	1,381	329	31.7
Textile and clothing, Prato	1,066	1,383	317	29.11
Desserts, Alba and Cuneo	528	844	315	59.11
Instrumental mechanics, Vicenza	1,439	1,752	314	21.12
Scaligera thermomechanics	855	1,165	310	36.6
Metal mechanics, Lecco	1,611	1,921	309	19.6
Textiles, Biella	1,014.60	1,064.80	50.3	5
Mechatronics, Bari	949	999.1	50.1	5.3

Table 2 - Source: Intesa Sanpaolo on Istat

Number of containers exported and ports of export

% di imprese

100% imports or exports of goods by sea in containers

EXPORT

0-50 containers — 62%
51-500 containers — 38%

62% VENICE
54% GENOA
15% LA SPEZIA
8% OTHER ITALIAN PORTS
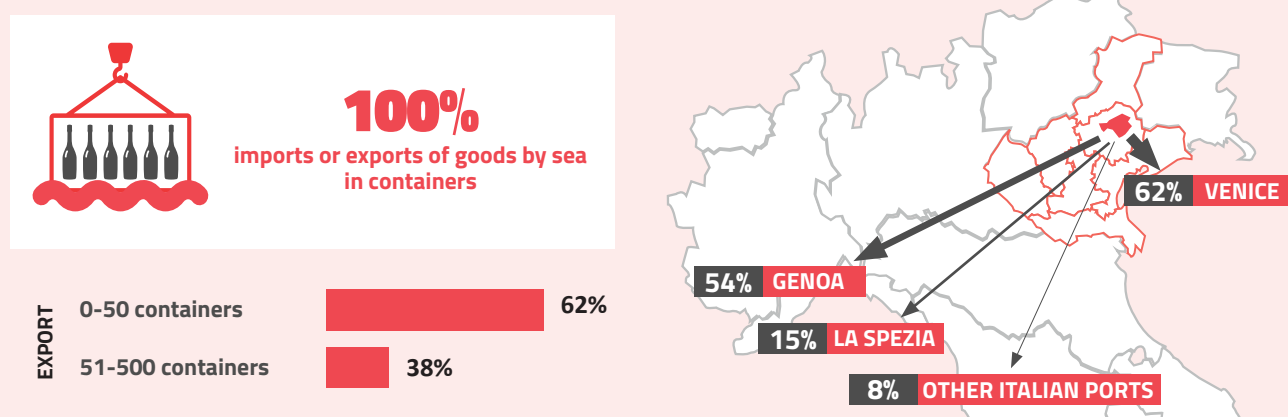
Figure 30 - Source: SRM/Contship

How to connect the company with the port

% of companies

ROAD

77% 🚌

RAIL

8% 🚆

INTERMODAL

15% 🚌 🚆

Reasons:

Convenience of service
Economy of scale
Adequate frequency of services

Figure 31 - Source: SRM/Contship

North America is the main destination for exports. Vancouver is the main port of arrival.

The survey data show the presence of well-defined logistic corridors for the prosecco district of Conegliano Valdobbiadene. Though companies do not concentrate their activities in a single port, but divide them between Venice and Genoa, the choice of destination markets seems clearer. In fact, North America is one of the 2 main destinations for 85% of companies (with Vancouver as port of call for 46% of companies); Europe for 31%; Asia for 15%, with Japan as the preferred destination.

Main target markets

% of companies

Main two countries for exported goods *	%
AMERICA: North America	**85**
United States	54
Canada	46
EUROPE	**31**
Europe gen.	15
North Europe	15
France	8
ASIA: Japan	**15**
OCEANIA: Australia	**8**
AFRICA	**0**

Main ports for exported goods related to the main countries **	%
AMERICA: North America	**54**
Vancouver	46
New York	15
EUROPE	**15**
Marseille	8
Rotterdam	8
ASIA	**15**
Tokyo	8
Nagoya	8
OCEANIA: Sidney	**8**
AFRICA	**0**
OTHER PORTS	**23**
NO PORT SPECIFIED	**46**

* First + second country for imports.
** Ports for export for first + second country.

Figure 32 - Source: SRM/Contship

Logistics outsourced by most companies.
The clause Ex Works preferred by all companies

Most of the companies belonging to the district (62%) consider Logistics as a function to be outsourced. As regards the contractual cluse used in export operations, Ex Works is the preferred choice for 100% of the companies. Contrary to what was indicated in the overall data, for the district alone, the fact that Ex Works is chosen is not due to the desire to keep the price low on the part of the companies, but is linked to the willingness to transfer the risk associated with logistics and customs operations to the buyer.

Outsourcing and Incoterms

% of companies

OUTSOURCED LOGISTICS — 62% — **100% EX WORKS**

NOT OUTSOURCED LOGISTICS — 38%

Why Ex Works?

We see it as an effective way of assigning the risk associated with logistics and customs operations to the buyer — 46%

We consider it an effective way to keep the price low, by avoiding to integrate the costs of transport to destination in the overall cost — 38%

We do not want/we are not able to pay for the transport to the destination — 31%
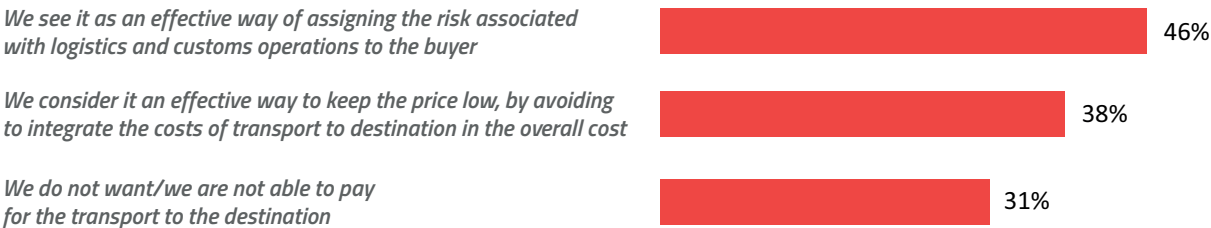
Figure 33 - Source: SRM/Contship

There are few companies in the district that consider sustainability as part of the internal governance system

In line with what emerged for the entire sample, there are few companies (8%) in this district that consider sustainability as an integral part of internal governance. Again, the companies interviewed showed positive sentiment towards the demand for sustainability. In fact, when asked "on a scale of 1 to 10, how important is sustainability to customers", 31% felt it was very important (9-10) for environmental and social sustainability; 23% for economic sustainability. This percentage rises to 54% in all three cases if we repeat the question in relation to a two-year perspective.

The approach to sustainability

% of companies

Sustainability is part of the internal governance system

INCLUDED SINCE THE COMPANY WAS BORN

8%

NOT INCLUDED

92%
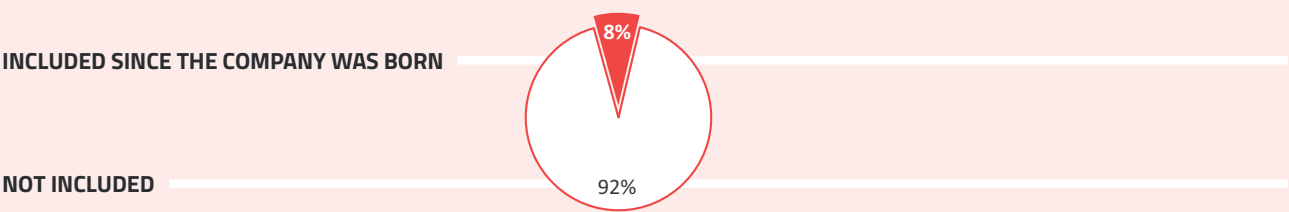
Customers give value to sustainability
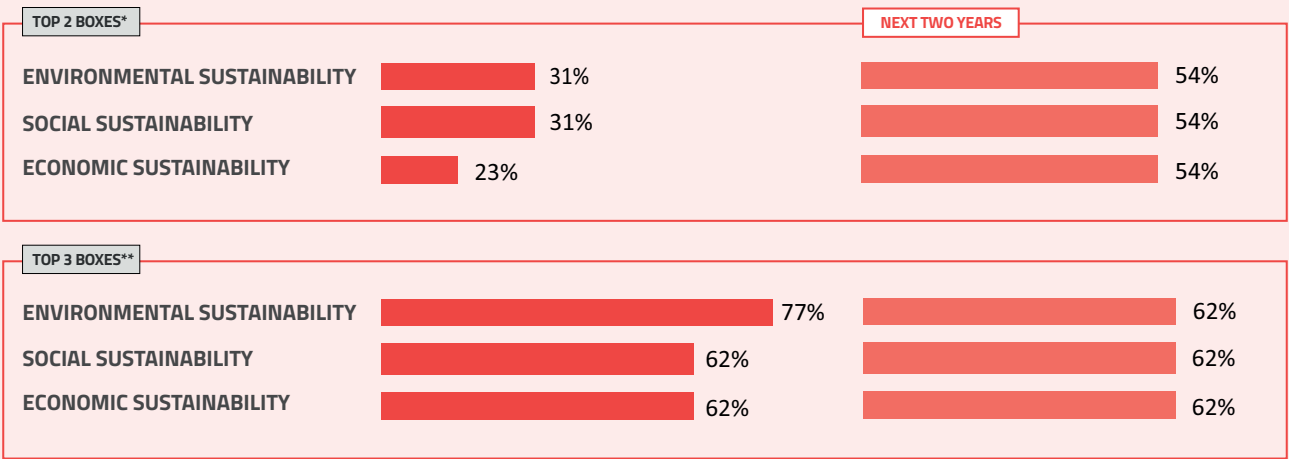
TOP 2 BOXES*

		NEXT TWO YEARS
ENVIRONMENTAL SUSTAINABILITY	31%	54%
SOCIAL SUSTAINABILITY	31%	54%
ECONOMIC SUSTAINABILITY	23%	54%

TOP 3 BOXES**

ENVIRONMENTAL SUSTAINABILITY	77%	62%
SOCIAL SUSTAINABILITY	62%	62%
ECONOMIC SUSTAINABILITY	62%	62%

* *Top 2 boxes*: percentage of companies that gave a 9 or 10.
** *Top 3 boxes*: percentage of companies that gave the variable an 8, 9 or 10.

Figure 34 - Source: SRM/Contship

The district tends to give greater importance to the logistics system

The general analysis carried out on the importance of the logistics system and satisfaction, based on opinions of 12 variables, was also carried out on the companies in the Conegliano Valdobbiadene district.

One of the first interesting elements which arose from this analysis is that these companies tend to attribute, on average, more importance than companies in the Veneto region: for 10 variables out of 12, the percentage of companies that felt it was very important (9-10) was more than in Veneto. The average importance index is 8.59 (to be compared with the 8.14 recorded for Veneto).

Importance of the logistics system

*Top 2 boxes** and 10-point scale of importance

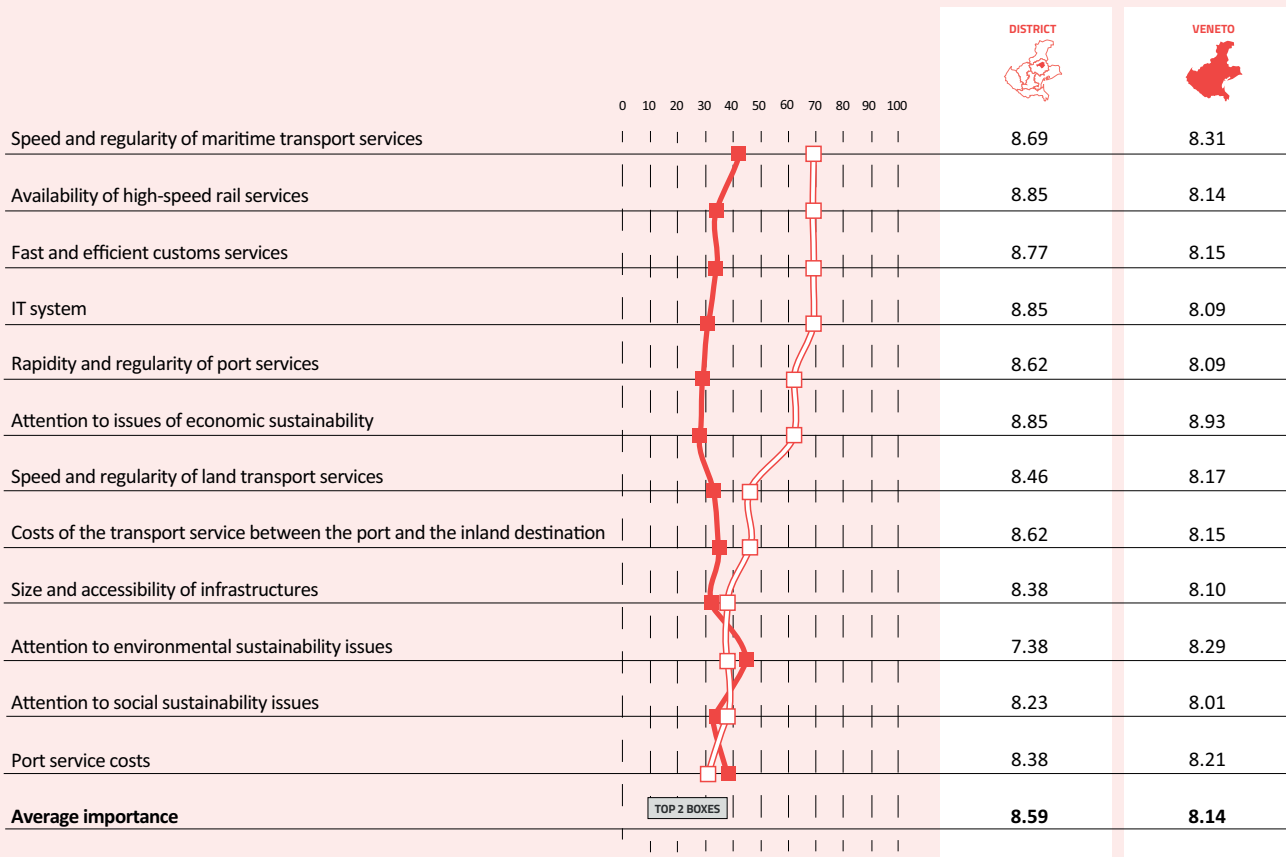|	DISTRICT	VENETO
Speed and regularity of maritime transport services	8.69	8.31
Availability of high-speed rail services	8.85	8.14
Fast and efficient customs services	8.77	8.15
IT system	8.85	8.09
Rapidity and regularity of port services	8.62	8.09
Attention to issues of economic sustainability	8.85	8.93
Speed and regularity of land transport services	8.46	8.17
Costs of the transport service between the port and the inland destination	8.62	8.15
Size and accessibility of infrastructures	8.38	8.10
Attention to environmental sustainability issues	7.38	8.29
Attention to social sustainability issues	8.23	8.01
Port service costs	8.38	8.21
Average importance	**8.59**	**8.14**

* *Top 2 boxes*: percentage of companies that gave a 9 or 10.

Figure 35 - Source: SRM/Contship

Conclusions

It is clear that when we are faced with a district with an international vocation and a sensitive product such as wine, logistics represent a strategic factor. This is clear in an higher average index of importance than the total sample of companies in the Veneto region. However, this does not eliminate the tendency of companies to export with Ex Works, which in this case has been chosen by all companies.
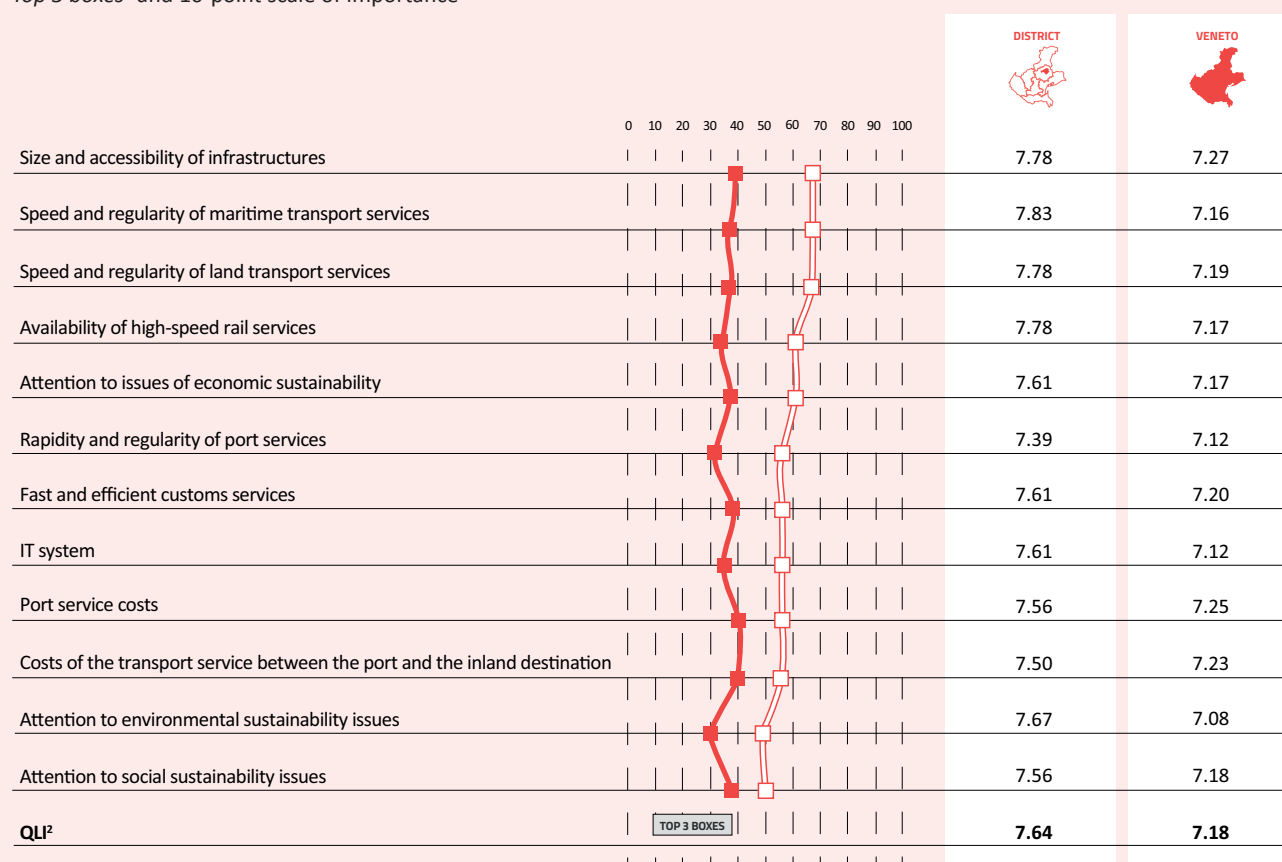
follow ▶

The analysis of QLI² shows a gap between the importance given to logistic factors and the satisfaction of the reference logistic system

Similar considerations emerge with respect to levels of satisfaction, on average higher than those observed for companies in Veneto. The QLI² is also, in this case, significantly lower than the average importance. The gap between the two indicators shows that satisfaction is not high enough, given the level of importance attached to the logistical dimension.

Satisfaction assessment attributed to the container freight service in the different ports

Top 3 boxes[*] and 10-point scale of importance

	DISTRICT	VENETO
Size and accessibility of infrastructures	7.78	7.27
Speed and regularity of maritime transport services	7.83	7.16
Speed and regularity of land transport services	7.78	7.19
Availability of high-speed rail services	7.78	7.17
Attention to issues of economic sustainability	7.61	7.17
Rapidity and regularity of port services	7.39	7.12
Fast and efficient customs services	7.61	7.20
IT system	7.61	7.12
Port service costs	7.56	7.25
Costs of the transport service between the port and the inland destination	7.50	7.23
Attention to environmental sustainability issues	7.67	7.08
Attention to social sustainability issues	7.56	7.18
QLI²	**7.64**	**7.18**

[*] *Top 3 boxes*: percentage of companies that assigned 8, 9 or 10 to the variable.

Figure 36 - Source: SRM/Contship

The companies in the district, like the rest of the sample, do not yet adopt sustainability as an element of internal governance, but perceive its potential. Sustainability could therefore be the key element to reduce sales in Ex Works and also to adopt more intermodal oriented choices. In this way, the district's position, which is already good, would be strengthened and consolidated in international markets.

International and Domestic LPI

The World Bank releases the Logistics Performance Index (LPI) every two years.
The LPI classifies countries according to six dimensions which include: 1) customs efficiency; 2) quality of infrastructure; 3) ease of arranging shipments; 4) quality of logistics services; 5) ability to track and trace deliveries; 6) on-time deliveries (timeliness).
It includes:
1) the *International LPI*;
2) the *Domestic LPI*.

International LPI

According to the *2018 LPI*, Italy ranks 19th out of 160 countries, two positions up compared to the 2016 ranking. Among the European countries, the following countries rank in the top 10 positions: Germany, Sweden, Belgium, Austria, Holland, Denmark, United Kingdom, Finland.

Domestic LPI

The *Domestic LPI* urveyed logistics professionals to assess the logistics environments in their own countries. This domestic evaluation contains more detailed information on countries' logistics environments, core logistics processes and institutions, and time and distance data.

The *Domestic LPI* includes two types of indicators:

1) *Domestic LPI - Performances*;
2) *Domestic LPI - Environment and Institutions*.

The first set of indicators provides information on distance and waiting times for imported and exported goods both with reference to the port or airport supply chain and to the land supply chain.
With reference to exports, waiting times in Italy are higher than those noted for Germany (*2018 Top Performer*) both for to the port or airport supply chain and to the land supply chain.
The World Bank survey provides information on the perception of local logistics operators about: fees, quality of infrastructure, quality of services provided, sources of major delays, changes and developments in the logistics system.
As regards port charges, only 38% of respondents consider them "high or very high" (compared to 47% for Germany), while for airports the percentage is 58% (in line with Germany). On the other hand, 50% of respondents consider road transport costs too high (compared to 27% for Germany); the percentage is 45% for rail transport (compared 25% for Germany).
31% of Italian operators consider the quality of ports infrastructures "low or very low" (0% in Germany). The percentage is 17% for airports and roads (0% and 14% in Germany). For rail transport, the percentage of dissatisfied respondents is 67% (compared to 23% in Germany).
The percentage of respondents who consider the quality of services in the maritime sector "high or very high" is 54% (95% for Germany); this figure is 50% for airport services (95% for Germany), 9% for rail transport services (62% for Germany) and 42% for road transport (95% for Germany).
For 25% of Italian logistics operators transhipment transactions are among the major causes of logistical delay, a number which is, however, not very high.
A large percentage of respondents have noted improvements in the logistics system in recent years: almost 70% in the clarity of customs procedures (compared with 56% in Germany), 50% in transport infrastructure and 67% in logistics services.

Domestic LPI - Perfomances

	Italy	Top Performer 2018 (Germany)
Export time and distance / Port or airport supply chain		
Distance (kilometers)	269 km	212 km
Lead time (days)	3 days	2 days
Export time and distance / Land supply chain		
Distance (kilometers)	541 km	569 km
Lead time (days)	5 days	2 days
Import time and distance / Port or airport supply chain		
Distance (kilometers)	210 km	350 km
Lead time (days)	4 days	2 days
Import time and distance / Land supply chain		
Distance (kilometers)	519 km	559 km
Lead time (days)	5 days	3 days

Table 9 - Source: SRM/Contship on World Bank

Domestic LPI - Environment and Institutions

	Italy (%)	Top Performer 2018 (Germany) (%)
Fees and Charges - Percentage of respondents answering high/very high		
Port charges	38	47
Airport charges	58	58
Road transport rates	50	27
Rail transport rates	45	25
Quality of trade and transport related infrastructure - Percentage of respondents answering low/very low		
Ports	31	0
Airports	17	0
Roads	17	14
Rail	67	23
Quality of service delivered - Percentage of respondents answering high/very high		
Road	42	95
Rail	9	62
Air transport	50	95
Maritime transport	54	95
Sources of Major Delays - Percentage of respondents answering improved or much improved		
Compulsory warehousing/transloading	0	0
Pre-shipment inspection	8	5
Maritime transhipment	25	5
Changes - Percentage of respondents answering improved or much improved		
Customs clearance procedures	69	56
Trade and transport infrastructure	50	45
Private logistics services	67	70

Table 10 - Source: SRM/Contship on World Bank

SRM

SRM is a Center for Studies, connected with the Intesa Sanpaolo Group, specialized in the analysis of regional economic dynamics in a European and Mediterranean perspective, and it is today an international reference point for the research carried out within the Permanent Observatory on the Economy of Maritime Transport and Logistic.

www.sr-m.it
www.srm-maritimeconomy.com

Contship Italia Group

Contship Italia is the market leader in the maritime container terminal and intermodal transport business. Contship Italia belongs to the Eurokai Group and operates in the ports of La Spezia, Ravenna, Salerno, Tangiers, and in the transport interchange centre of Melzo (MI).

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Corridors and logistics efficiency of the territories 2018

maritime economy