



LOGISTICS & MARITIME FORUM  
The sustainable, connected and resilient road to 2030

16-17 October 2019, La Spezia Expo

## Relevance and future developments of the Piacenza logistics sector in the Italian context

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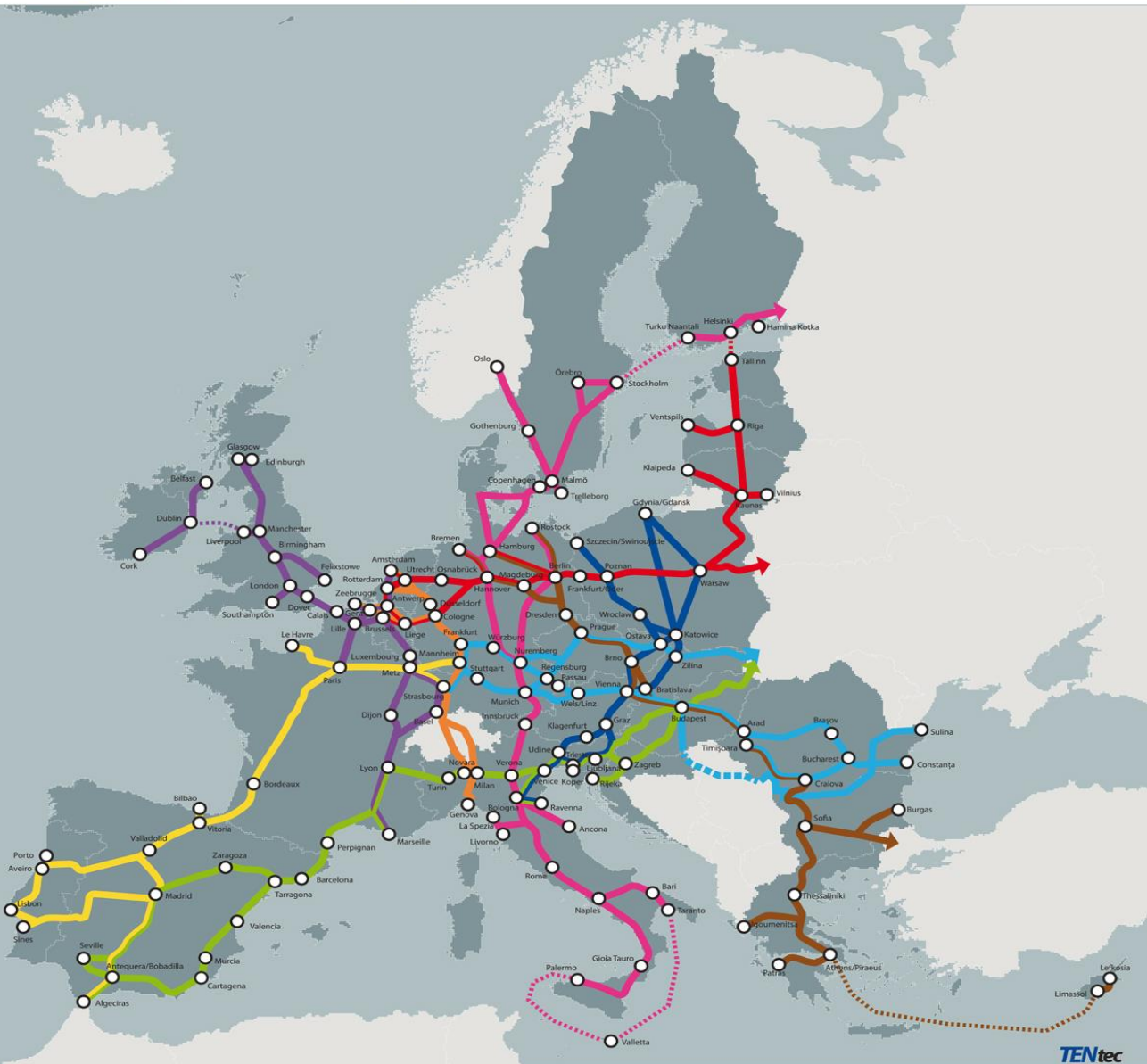
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# Agenda

- Contract Logistics in Emilia-Romagna and Piacenza Province
- Polo Le Mose: the freight village in the city of Piacenza
- Future developments & perspectives



- 9 *core* corridors - Trans European Network-Transport (TEN-T)
- 4 out of 9 cross Italy and 3 of them cross the Emilia-Romagna region

- **Baltic Adriatic Corridor**
- **Mediterranean Corridor**
- **Scandinavian-Mediterranean corridor**



Legend

|                    |                              |                           |
|--------------------|------------------------------|---------------------------|
| BALTIC - ADRIATIC  | ORIENT / EAST-MED            | ATLANTIC                  |
| NORTH SEA - BALTIC | SCANDINAVIAN - MEDITERRANEAN | NORTH SEA - MEDITERRANEAN |
| MEDITERRANEAN      | RHINE - ALPINE               | RHINE - DANUBE            |

BASED ON THE OUTCOME OF THE INFORMAL TRILOGUE OF 27th JUNE 2015

TEN-t



# Transport and logistics companies in Emilia Romagna and Italy

(2018;  
% changes  
2011-18)

| Categories of Logistics                                | N. Companies in Emilia Romagna (% Italy) | N. Companies in Italy (2018) | % changes 2011-18 Emilia-Rom (Italy) |
|--|--|------------------------------|--------------------------------------|
| Road hauliers organized in companies limited by shares | 1.311 (6,1%)                             | 21.514                       | +31% (+41%)                          |
| Road hauliers no companies limited by shares           | 7.428 (10,4%)                            | 71.498                       | -12% (-14%)                          |
| Couriers / Express Couriers                            | 59 (8,7%)                                | 679                          | +73% (+4%)                           |
| Freight villages / Intermodal terminals                | 2 (2,3%)                                 | 86                           | 0% (+2%)                             |
| Warehousing and storage                                | 560 (13,2%)                              | 4.238                        | +26% (-28%)                          |
| Freight rail transport and combined road-rail          | 0 (0%)                                   | 43                           | 0% (+39%)                            |
| Other logistic operators                               | 156 (15,0%)                              | 1.043                        | +24% (+6%)                           |
| Freight forwarders                                     | 542 (22,9%)                              | 2.370                        | +34% (-3%)                           |
| <b>TOTAL</b>   | <b>10.058 (9,9%)</b>                     | <b>101.471</b>               | <b>-4% (-6%)</b>                     |



# Revenues of transport and logistics companies in Emilia-Romagna and Italy

(M€ 2018, % changes 2011-18)

| Categories of Logistics                                | Revenues in Emilia Romagna (% Italy) | Revenues in Italy (2018) | % changes 2011-18 Emilia-Rom (Italy) |
|--|--------------------------------------|--------------------------|--------------------------------------|
| Road hauliers organized in companies limited by shares | 4.561 (17,8%)                        | 25.659                   | +10% (+2%)                           |
| Road hauliers no companies limited by shares           | 1.440 (10,2%)                        | 14.063                   | -12% (-1%)                           |
| Couriers / Express Couriers                            | 1.488 (23,0%)                        | 6.475                    | +47% (+24%)                          |
| Freight villages / Intermodal terminals                | 29 (3,4%)                            | 853                      | +9% (+1%)                            |
| Warehousing and storage                                | 1.846 (23,7%)                        | 7.786                    | -7% (+1%)                            |
| Freight rail transport and combined road-rail          | 0 (0%)                               | 935                      | 0% (+11%)                            |
| Other logistic operators                               | 1.552 (15,5%)                        | 9.982                    | +26% (+16%)                          |
| Freight forwarders                                     | 1.498 (10,1%)                        | 14.839                   | +9% (+5%)                            |
| <b>TOTAL</b>   | <b>12.414 (15,4%)</b>                | <b>80.592</b>            | <b>+9% (+5%)</b>                     |



# Employees in transport and logistic firms in Emilia-Romagna and Italy

(2018;  
% changes  
2011-18)

| Categories of Logistics                                | N. Employees in in ER (% Italy) | N. Employees in Italy (2018) | Var. % 2011-18 Emilia-Rom (Italia) |
|--|---------------------------------|------------------------------|------------------------------------|
| Road hauliers organized in companies limited by shares | 16.790 (7,7%)                   | 217.924                      | +34% (+69%)                        |
| Road hauliers no companies limited by shares           | 7.497 (28,1%)                   | 26.699                       | -10% (-72%)                        |
| Couriers / Express Couriers                            | 2.320 (25,7%)                   | 9.020                        | +122% (+146%)                      |
| Freight villages / Intermodal terminals                | 51 (2,3%)                       | 2.208                        | -2% (+14%)                         |
| Warehousing and storage                                | 21.331 (16,9%)                  | 126.469                      | +37% (+16%)                        |
| Freight rail transport and combined road-rail          | 0 (0%)                          | 4.467                        | 0% (+11%)                          |
| Other logistic operators                               | 21.112 (14,3%)                  | 147.458                      | +3% (+58%)                         |
| Freight forwarders                                     | 6.238 (6,2%)                    | 100.063                      | +26% (+43%)                        |
| <b>TOTAL</b>   | <b>75.339 (11,9%)</b>           | <b>634.308</b>               | <b>+20% (+26%)</b>                 |

# TOP BRANDS



# ERIC.

EMILIA-ROMAGNA INTERMODAL CLUSTER

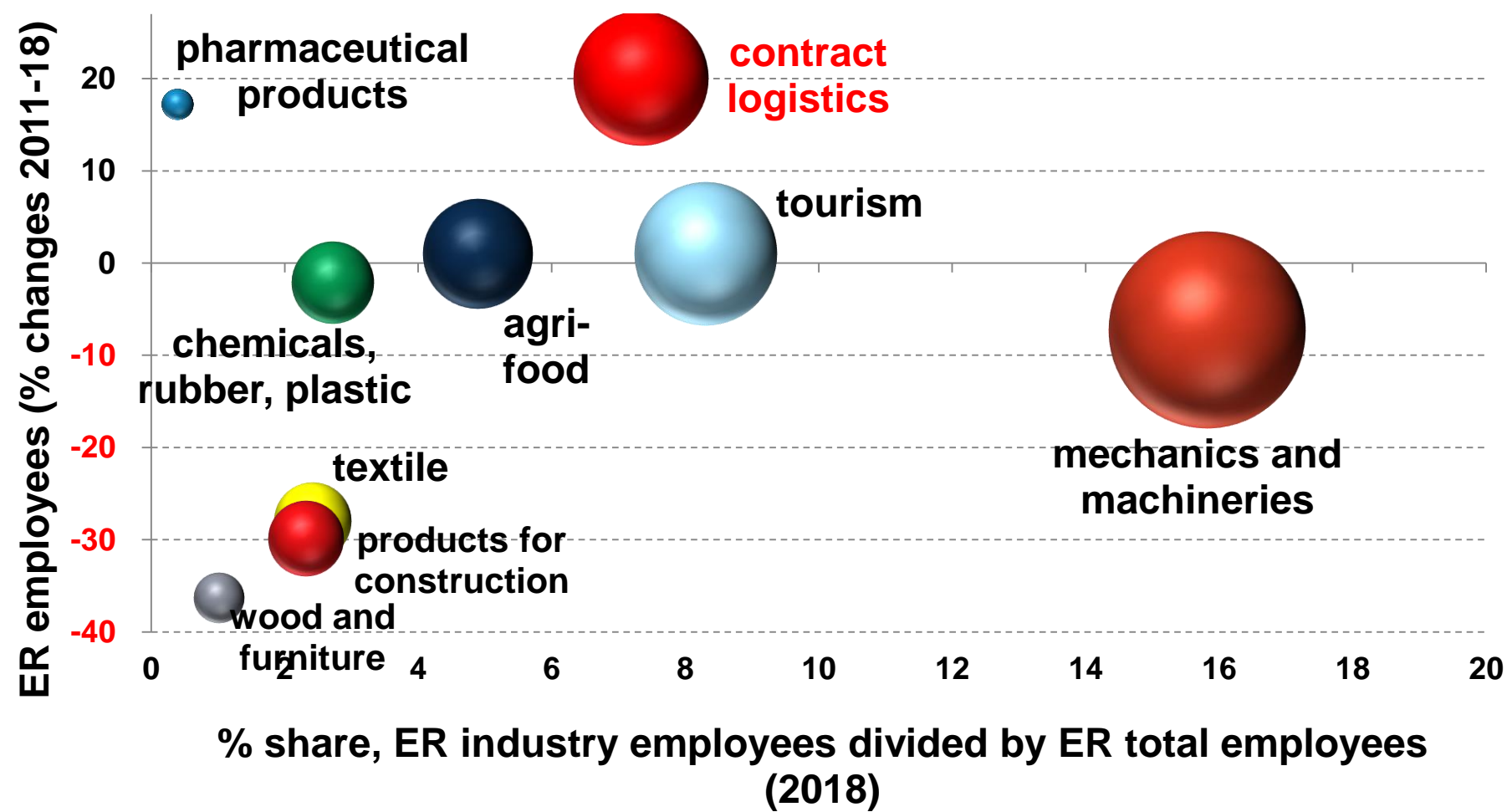


[www.ericintermodal.com](http://www.ericintermodal.com)

8 infrastructure managers / public terminals with over 500 companies employing almost 14,000 employees



# Employment in the main industries of Emilia-Romagna (2018)

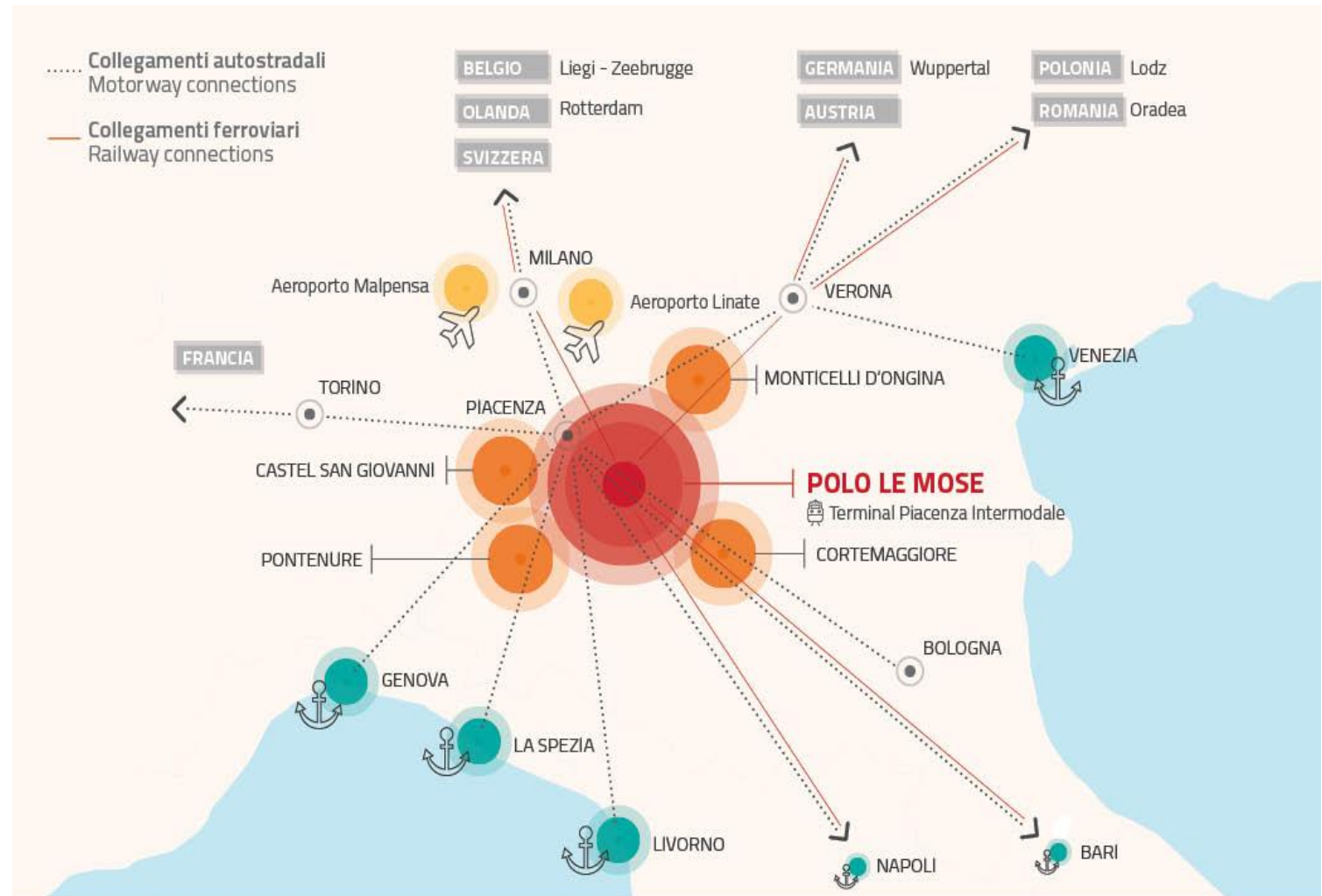


The size of spheres represents the amount of employees in the ER industrial companies



# The strategic geographic location of Piacenza

- in the middle of north-south and east-west links
- near to the main cities of northern Italy, Tyrrhenian and Adriatic ports, and main airports (max 150 km away)
- 2 highways (A1 Milan-Bologna, A21 Turin-PC-Brescia)





## Contract Logistics in Piacenza

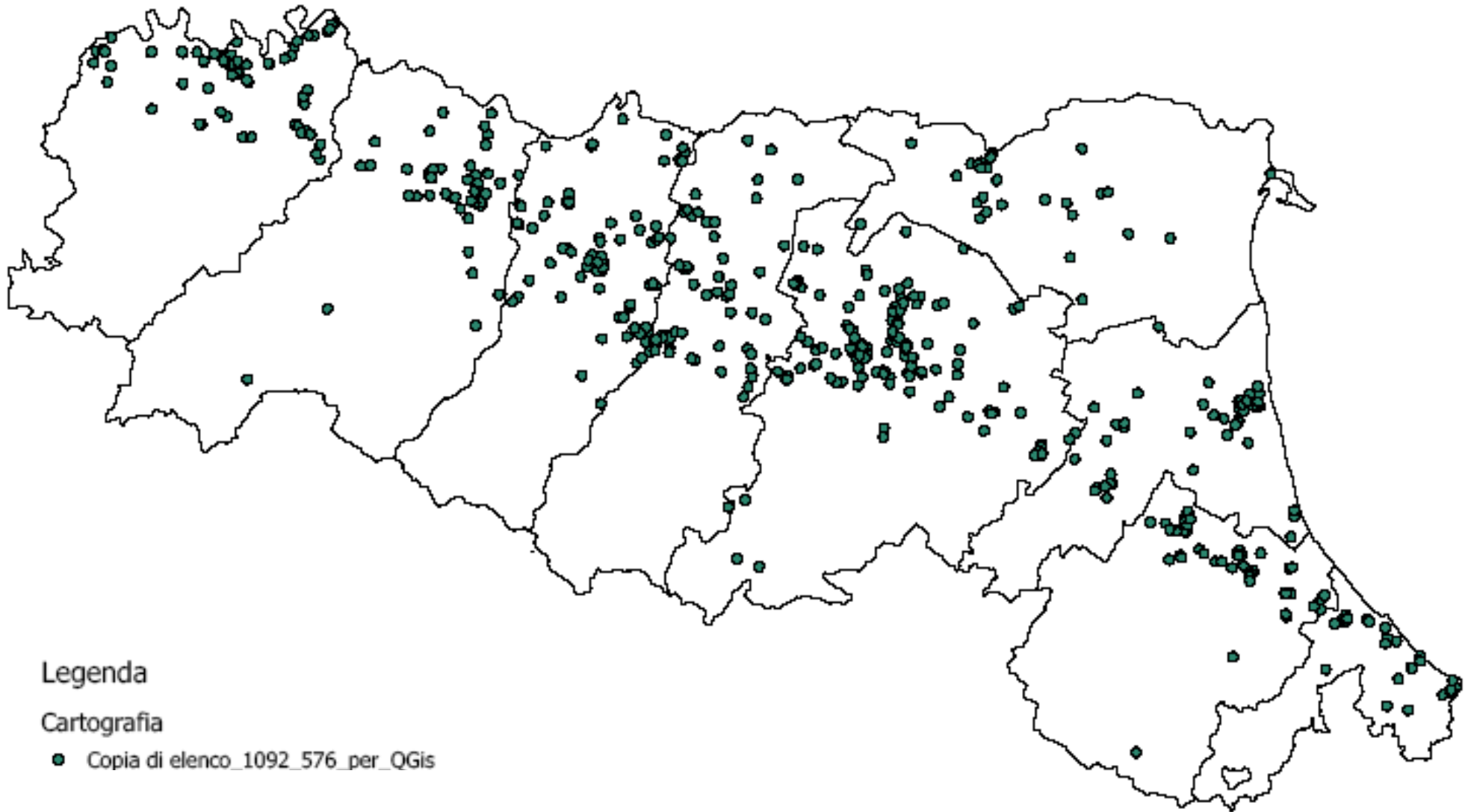
- **719** logistic companies
- over **7.451** employees
- turnover of 1.1 **billion euros** (RER: 12,4; IT: 80B €)

## Incoming and outgoing freight flows in Piacenza province by transport mode - 2018

|                 | Flows of goods * |     |
|-----------------|------------------|-----|
|                 | 1000 t.          | %   |
| Truck flows     | 17.551           | 78  |
| Railway flows   | 5.030            | 22  |
| Air cargo flows | 0                | 0   |
| Total           | 22.581           | 100 |

\* estimates by ITL Foundation based on Eurostat database, Istat

# Warehouses locations in the Emilia-Romagna region (ITL survey)



- There are 1,092 warehouses for the handling and storage of goods

# Contract Logistics activities managing warehouses for main activity by location (province)

| Province      | n. UL        | %           | Average Sqm  |
|---------------|--------------|-------------|--------------|
| Piacenza      | 121          | 11%         | 17.200       |
| Parma         | 121          | 11%         | 10.500       |
| Reggio Emilia | 140          | 13%         | 5.900        |
| Modena        | 129          | 12%         | 4.000        |
| Bologna       | 303          | 28%         | 6.100        |
| Ferrara       | 52           | 5%          | 5.600        |
| Forlì-Cesena  | 86           | 8%          | 3.100        |
| Ravenna       | 93           | 8%          | 11.500       |
| Rimini        | 47           | 4%          | 3.500        |
| <b>Total</b>  | <b>1.092</b> | <b>100%</b> | <b>7.200</b> |

| Sub-sector               | n.           | %          |
|--------------------------|--------------|------------|
| Road transport companies | 454          | 42         |
| Warehousing and storage  | 638          | 58         |
| <b>Totale</b>            | <b>1.092</b> | <b>100</b> |

The logistics activities nearby the city of Milan present 860 warehouses with an average extension of 15,000 sq. m



## Le Mose Logistic area

- Workers employed in Polo Le Mose are about 2,000
- There are about 2,500 employees in peak periods
- At Polo Le Mose, logistic companies employ 30% of overall employees of the Polo.
  - The 75% of the logistic companies are Italian white collars
- The remaining 70% of employees belong to porterage cooperatives, to whom logistics operators outsource mainly warehouse management activities
- In the warehouses, 2 out of 3 employees are foreign workers
  - Ecuador, Macedonia, Albania, Romania, Philippines, Senegal, Morocco



## Future developments & Perspectives

- (Outbound logistics) Heavy trucks-long distance VS (Inbound logistics) Light trucks-short distance
- Boost combined (rail-road) transport through the Alps as well as port-inland rail connection also thanks to the ZLS related opportunities
- Dispersed entities (Flagship project)
- Social impact and integration
- Close the gap between logistic areas and urban areas
- SUMP
- Increasing demand of new logistics facilities (2 M sq. m built plus 1 M sq. m to be built)
- From Transport & Logistics (execution) towards R&D and Innovative delivery solution (logistics as a data-centric industry) & New generation of handling, transportation and storage technologies and facilities for seamless, fast flow & exchange of loads
- Training & Education: ITS on transport & logistics (based in Piacenza with a regional scope)



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Thank you!