Logistics in Turin and Piedmont

The choice of success
In the heart of North West Italy
At the centre of European development
Invest in Turin and Piedmont

A favourable environment.

A unique industrial vocation

Turin and Piedmont, located in the heart of Europe, a market of 450 million people, can boast a deep industrial know-how and diversified manufacturing activities.

Production Units of Industry in Piedmont

Piedmont is the cradle of large-scale Italian industry, but it is also the home of small and medium enterprises. This is the so-called company network model, based on the strong link between large manufacturing industry and the operating flexibility of the SME.

Among the most active sectors in the region are the automotive, with an integrated fabric of companies that supply parts and components, machinery, equipment and services, and the transportation industry.

The Olympic legacy

The 2006 Winter Olympics leave a major legacy in tangible and intangible benefits in Turin and throughout Piedmont: new and efficient transport infrastructures, sports facilities amongst the most modern and high-tech in the world and new hospitality facilities. Equally important is the know-how acquired in the management of major events, and the new, positive international image of the whole region.

A "five star" region

With its extensive vineyards, hundreds of kilometres of ski slopes, spa towns, lakes, nature parks and a vast artistic heritage, Piedmont has much to offer. Everything is at your fingertips, from the Alps to the Mediterranean Sea, with Liguria and the Côte d'Azur just an hour away. The region has successfully hosted the Winter Olympics of Torino 2006 and is now equipped with brand-new facilities and further specialized services.

Logistics - why Turin and Piedmont

An efficient logistics system

- A network of around 1,000 km of motorways and 3,000 km of railways connects the region with main Italian and European cities, with easy access to all parts of Europe.
- Its vicinity to Mediterranean ports and an integrated logistics system allow fast and efficient movement of goods and people along the main national and international lines.
- The international airport of Turin Caselle, only 20 minutes from the city centre, provides daily links with the main economic and business centres in Italy and Europe. Malpensa, the most important intercontinental airport in southern Europe, 100 km from Turin, completes the range with connections to the markets of North America and the Far East.
- Over the next 10 years more than €30bn investments have already been planned and started, to improve the region's infrastructures: road network, airport, railways, intermodal and logistics platforms, tunnels.

Piedmont Facts & figures

- 4 million inhabitants (7.5% of the national population)
- €153bn GDP (8.4% of the national total)
- 460,000 companies
- €3.6bn exports
- €3.5bn FDI inflows and outflows 2003-2005 (8.2% of the national total)
- 1.6% of GDP invested in RD

Strengths

- Access to the Central European and Mediterranean areas
- Over €30bn invested to improve the whole region's transport infrastructure
- An Italian region for expenditure on innovation in the manufacturing sector (source: ITP)
- Skilled and flexible workforce at competitive costs
- Training institutions and R&D centres of international standing
- State-of-the-art telecommunications infrastructure with the first Italian Neutral Access Point (NAP)
- An efficient and reliable public administration
- A wide range of location opportunities in the target areas Obj. 2 funded by the EU
- Strategic support for new investments
- Quality of life
- Turin Host City of The Olympic Winter Games in 2006

Piedmont Logistics

- Metals, including machining and manufacturing machines, motor vehicles, transportation equipment
- Textiles and clothing
- Furniture, various manufacturing
- Paper, publishing and printing
- Food
- Textiles and clothing
- Electronic equipment
- Medical equipment
- Plastics and rubber
- Machines, motor vehicles, transportation equipment
- Textiles and clothing
- Food
- Textiles and clothing
- Medical equipment
- Electronic equipment
- Paper, publishing and printing
- Tobacco and tobacconists
- Chemicals
- Wood and wood products
- Metals excluding machines
- Food
- Textiles and clothing
- Machinery
- Chemicals
- Food
- Textiles and clothing
- Machinery
- Medical equipment
- Electronic equipment
- Paper, publishing and printing

(Source: ITP elaboration on InfoCamere data 2005)
Towards a Regional Logistics Plan
The Piedmont Region (www.regione.piemonte.it) is drawing up its own Logistics Plan, based on the major projects which have been launched and in part completed to strengthen its system of transport infrastructures:
- the high-speed rail line between Turin and Novara is open, and will reach Milan in 2009;
- the Asti-Cuneo motorway is under construction;
- the plan for the third Liguria Apennine railway line has been approved.

The key points for action in the coming plan include the strengthening and specialization of the intermodal centres and platforms that constitute the backbone of the North-West’s logistics system (Novara, Alessandria, Orbassano).

Confirming its commitment to the development of the North-West logistics macro-area integrated with the Ligurian ports, the Region will join S.L.A.L.A. the logistics company of the Liguria/Alessandria arc, set up by Piedmontese and Ligurian bodies.

All the Region’s initiatives in this field are aimed at strengthening the whole Piedmont logistics system, thus also responding to new business requirements. Special marketing actions will also be taken to attract new companies that offer development prospects.

Towards a strengthened, integrated logistics system.

The National Logistics Plan
In 2006, Italy approved a National Logistics Plan hinging on four fundamental points: infrastructures, safety, intermodal transport, regulations and market. The strengthening of transalpine routes and ports are key points, bearing in mind Italy’s position at the centre of the Mediterranean.

- The Mediterranean basin is an integral part of the strategic project for the country’s transport and logistics, looking towards the emerging economies of North Africa, but solidly anchored to Europe and with a keen eye on East-West traffic flows.
- The indications given by the plan aim to create/strengthen an integrated and well-connected network of terminals, to lengthen the value chain of transport so as to enhance related activities: in-bound, production, out-bound, after-sales.

Changes in the transalpine traffic, major railway works
2007 Loetschberg base tunnel (Switzerland)
2009 Turin - Milan high-speed line
2011 San Gottardo base tunnel (Switzerland)
2015 Frejus tunnel and new Lyon - Turin line
The blue banana has been the “core” that has attracted the majority of investment in Europe. Another emerging growth pole is the Latin Arc, which has seen a surge of investment in high technology and advanced service sector industries in the past decade.

In Europe, production and consumption are strongly concentrated in a narrow belt, known as the “blue banana”, that stretches from Great Britain to the Po valley. As the only country that is part of both the “blue banana” and the “latin arc”, Italy will have the maximum concentration of the new TEN-Trans-European Networks (3 out of 4) and will see strong development in the logistics sector.

The Suez Canal channels all the traffic between the Far East and Europe in a single flow, and Italy is in the ideal geographical position to intercept and serve southern and central Europe. Furthermore, European imports from South-East Asia have increased twenty-fold in recent years.

The Suez Canal, Egypt’s most important international trade artery, commands the state’s attention as regards projects of revamping and performance improvements that have been implemented to raise it to international navigation technology needs. The canal draft is now 62 feet deep, allowing the transit of ships with a gross weight of 210,000 tons (source: www.sis.gov.eg). Ships of this size can moor in very few Mediterranean ports, and Genoa is one of these.

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Turin and Piedmont, the natural logistics platform for the port of Genoa
With the shifting of much manufacturing to the East, Piedmont has assumed a strategic role for distribution in Europe. Its position bordering Liguria makes it the ideal rear port location for the port of Genoa. Piedmont offers a strategic position to reach the entire European market:
- an extensive and efficient motorway system of 1,000 km
- the Torino-Caselle international airport (20 minutes from S.I.TO logistics platform and the centre of Turin)
- Milan Malpensa intercontinental airport (30 km from Novara freight village and 100 km from Turin)
- 3 logistics platforms: S.I.TO, C.I.M. Novara, Interporto Rivalta Scrivia
- 3 port options: Genoa, La Spezia, Savona.

Goods handled in the Ligurian Ports (2005)
Taken together, the Ligurian ports represent an integrated system able to offer tailored responses to the varied market demands, as they can count on diversified facilities highly specialised in operational terms.
In the next ten years, Liguria also aims to double its TEU capacity from three to six million, with works already underway.

The port of Genoa
Terminal Genoa port is Italy’s most important container for high added value operations, and one of the main ones in the Mediterranean, well connected to Gioia Tauro, the largest hub in the central Mediterranean. Genoa port provides the closest point to the heart of the European market for ships coming from the East via Suez. Its 13 terminals and their connections to the road and railway networks can manage all logistics activities.
Invest in Turin and Piedmont

**Logistics - Why Turin and Piedmont**

**Competitive advantages for logistics activities.**

- **Turin and Piedmont at the centre of European business**
  Piedmont, situated at the crossroads of the two main axes of European development, in the heart of North West Italy is a gateway to the European market, and the ideal point of access in the Mediterranean sea.
  The southern part of the region is very close to the sea and is just a few kilometres from the port of Genoa, one of the main terminal containers for high added value operations in the Mediterranean Sea.

- **Piedmont and Liguria are in the front line in Italy and Europe as regions that offer extraordinary prospects in the logistics sector.** This is thanks, first and foremost, to the fact that Liguria’s port system of Genoa-Savona-La Spezia is the only one in the Mediterranean that can handle latest-generation container ships, and is therefore the only alternative to northern Europe for in-coming traffic from the East, and southern Piedmont is its natural rear port.

- **A cost effective location**
  - Piedmont is centrally located to serve three major markets totaling 685 million people with a total GNP of US$ 7,942 bn.
  - Several cost-efficient options for warehousing strategically located to reach European consumers.
  - From a location in North West Italy, major consumer markets can be served better and reached faster at competitive costs.
  - A location in Turin has a direct impact on the bottom line, with shorter distances leading to cost reductions up to 70% by road and to 55% by rail.
  - Main logistics players with a strong international presence have located in Piedmont and offer great advantages to companies that need to reach European consumers.

**TEN and the three main markets within short reach**

1. TEN and the three main markets within short reach

   - Western Europe (1)
   - Eastern Europe (2)
   - North Africa and Middle East (3)

**The European Union is strongly committed to strengthening the Trans-European Transport Network**

The European Commission, in its White Paper on Transport Policy, proposed the implementation of motorways of the sea: short sea shipping services fully integrated into the European transport network, offering high frequency and high quality transport links.

The transport policy has to enable people to satisfy their needs for mobility under the best possible conditions, in a safe, rapid way, in a sustainable development perspective.

Short Sea Shipping is a major asset for Europe, because efficient transport leads to lower costs and increases the competitiveness of industries.

Transport policy has multiple issues, including the competitiveness of EU economy.

The efficient organization of transport also allows considerable time savings.


The construction of Trans-European Networks is an important element for economic growth and the creation of employment.

The European Union must aim to promote the development of Trans-European Networks as a key element for the creation of the internal market and the reinforcement of economic and social cohesion.

This development includes the interconnection and interoperability of national networks as well as access to such networks.

(source: http://europa.eu.int/comm/ten/transport/index_en.htm)
The increasing importance of the port of Genoa, is fuelling the growth of capacity for outbound logistics from Piedmont to Europe. Strong public investments are being made to exploit North-West Italy’s strategic position as a destination port.

**C.I.M. Centro Interportuale Merci Novara**
(www.cimspa.it)

**Intermodal terminal**: 160,000 sq.m  
**Storage and services area**: 230,000 sq.m  
**Roads and utilities**: 220,000 sq.m  

Novara freight village is one of the main reference points of the intermodal network in Italy. Situated on the border between the key regions of the Italian economy, Piedmont and Lombardy, at the crossroads of two important international routes - west-east through the Frejus rail tunnel, and north-south through the Swiss rail tunnels - it is a gateway towards the most important destinations in Northern France, the Netherlands, Belgium and Great Britain. The freight village’s seamless connections with the road and rail networks allow easy pick-up and delivery of intermodal loads.

**Interporto Rivalta Scrivia**
(www.interportors.it)

**Total area**: 2,000,000 sq.m  
**Goods handled**: 1,700,000 tonnes/year  

Interporto Rivalta Scrivia is a multipurpose logistics hub, capable of providing ad hoc, turn-key services. Located in the centre of an important industrial and commercial area in the north-west of Italy, it was established to act as the rear port of Genoa and as an additional wharf further inland.

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The freight village of Turin is located in a geographically strategic position for national and international connections. This fortunate location, the presence of a railway yard, with a shuttle service that links to France, the quality of the services provided and the use of high-technology systems have led to the concentration of large numbers of important companies in the transport and logistics sector. S.I.TO has become a leading company in transport infrastructure.

**S.I.TO**
(www.sitospa.it)

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**Goods handled**: 2,000,000 tonnes/year  

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This information sheet provides only a summary of information on the logistics sector in Piedmont as at May 2006. Please contact us to obtain any necessary information: info@itp-agency.org

**ITP services**

We support companies in developing their investment projects in Piedmont through macroeconomic factors and market research, pre-feasibility and feasibility studies, introduction to public and private agents in the region, selection of location opportunities in the target areas (objective 2) funded by the EU, and 360° support for the identification of incentives and fiscal advantages for investments.

Our services are free and confidential.