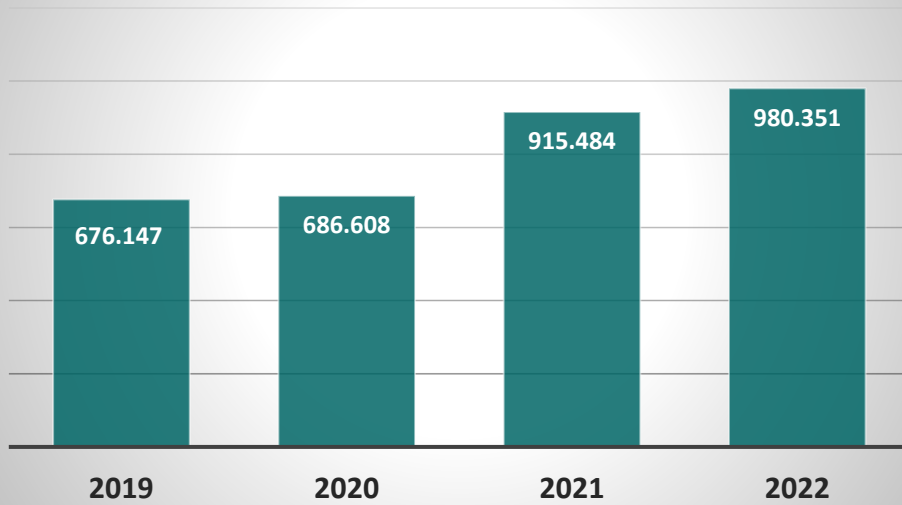


Terminali Italia

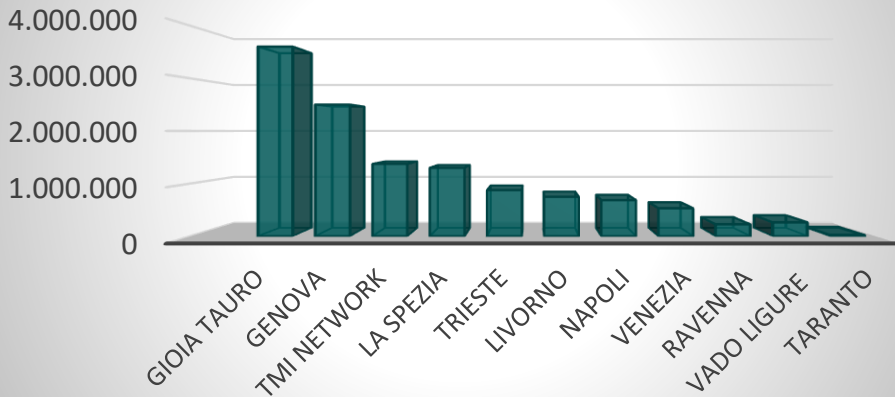


20 ottobre 2023

UNITS MOVED NETWORK

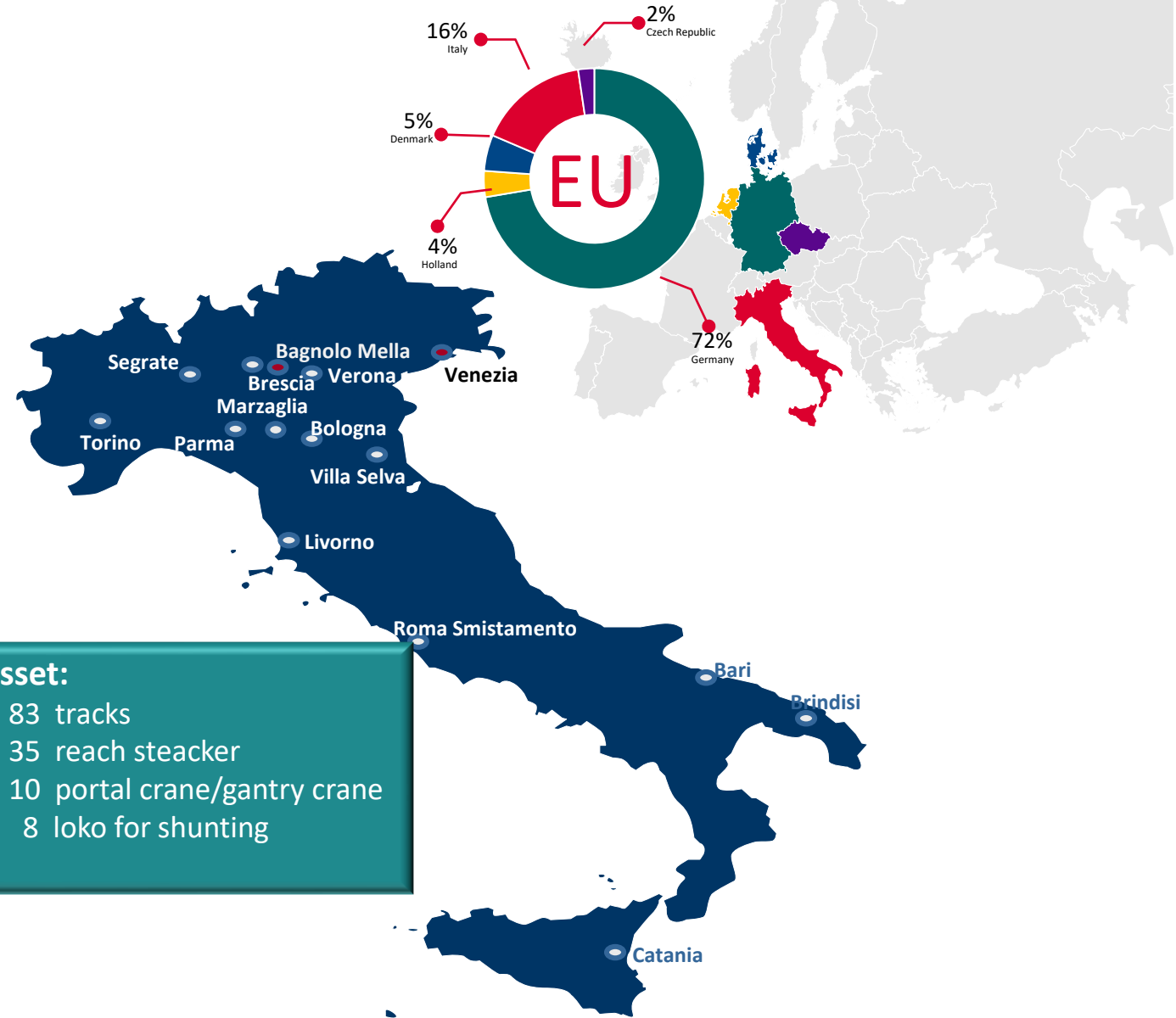


NETWORK TMI vs PORTI ITALIANI 22



Asset:

- 83 tracks
- 35 reach steacker
- 10 portal crane/gantry crane
- 8 loko for shunting



The World Bank's Logistics Performance Index (LPI).

The reference context

Contry (2018)	World LPI Rank	UE LPI Rank
Germany	1	1
Sweden	2	2
Belgium	3	3
Austria	4	4
Japan	5	
Paesi Bassi	6	5
Singapore	7	
Denmark	8	6
United Kingdom	9	
Finland	10	7
United Arab Emi	11	
Hong Kong, China	12	
Switzerland	13	
United States	14	
New Zealand	15	
France	16	8
Sapin	17	9
Australia	18	
Italy	19	10

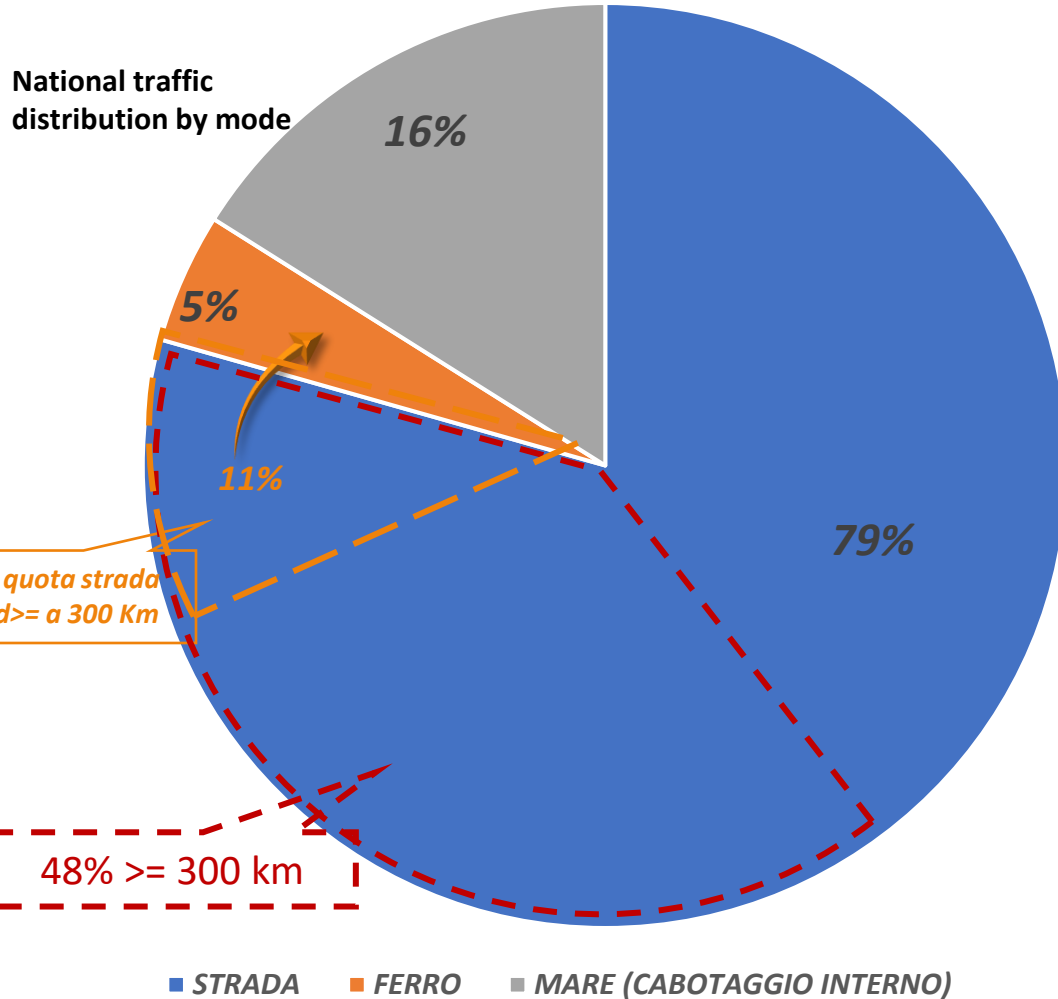
1. *Efficient completion of formalities at borders (customs)*
2. *Quality of commercial and transport infrastructures, including ICT*
3. *Easy to organize shipments at competitive prices*
4. *Expertise and quality of logistics services*
5. *Shipment tracking*
6. *Delivery times: compliance with the schedule*

- Physical **infrastructures** are a necessary but not sufficient condition for the **attractiveness** of the intermodal railway system.
- The "**competitiveness**" of the country's logistics system also impacts the competitiveness of the country's production fabric.

*«Economic distance» is more important than «physical distance»
(northern European ports...)*

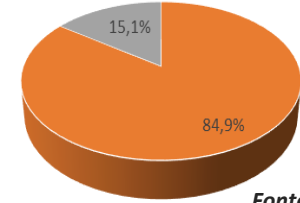
Why is railway intermodality important?

2030 system target: environmental sustainability but also competitiveness....



Fonte: elaborazione dati ISTAT 2020

Ripartizione merci traffici interni (ton*km)
strada, ferrovia, canali di navigazione interna



Fonte: elaborazione dati
Confcommercio 2015

■ strada ■ ferro

It highlights that to achieve the modal shift target for 2030 it is necessary to shift 11% of the current road modal share!!!

Is it possible to achieve this objective without taking into consideration the great contribution that intermodal terminals can make?

The reference market and railway's potential

90%

International trade occurs via sea

≈75%

The percentage of goods transported to Italy by sea in 2019

6°

Italy is one of the main importing/exporting countries in the EU28 19

20.000

This is the estimated shortage of drivers in Italy (400,000 in the EU): iron an opportunity for rubber and the sea

10 mld\$

Value of the goods that transit daily through the Suez Canal which carries 40% (in value) of the Italy/Asia trade

17%

Percentage of maritime traffic (containers, general cargo and ro-ro) that can be attracted by combined-railway traffic

77%

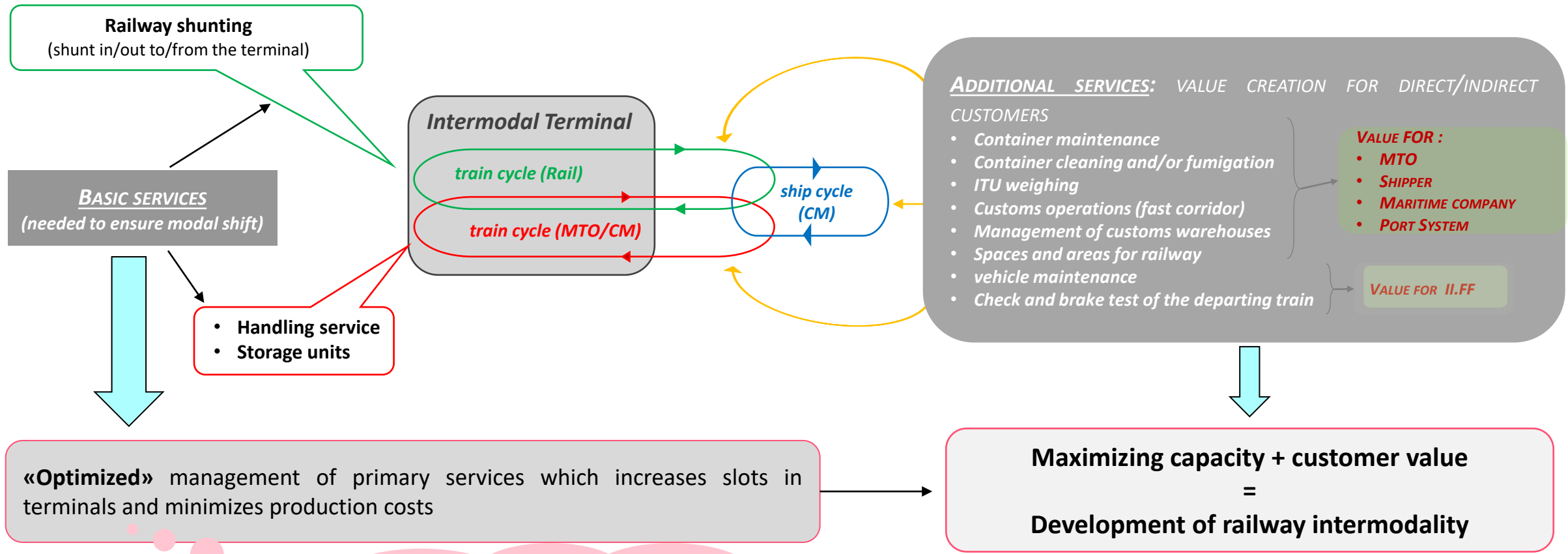
Percentage of trucks in circulation registered before 2010

2050

The centrality of the Mediterranean is undisputed until 2050. Italy is «the» strategic maritime platform for the relaunch of rail traffic towards Europe

Intermodal Terminal rule

A new approach: focus on creating value for the entire supply chain



They are like coffee at a bar: you definitely have to give them, but you won't fill up with customers if you only offer coffee!

The investment plan – production increases

Terminal	Produzione 2021 (coppie treni/week)	Produzione 2030 (coppie treni/week)
Bari Ferruccio	49	75
Catania Bicocca	12	18
Bologna Interporto	20	29
Brescia Scalo	19	28
Brindisi Scalo	3	6
Parma Castelguelfo	15	23
Livorno Guasticce	2	34
Marzaglia	17	51
Segrate Milano	58	90
Orbassano Torino	9	22
Verona QE (IV Modulo in start-up)	124	208
Società	328	584



+78%



The IV module of Verona QE is not included

We will continue the policy of integration with the ports

thanks for your attention
g.acquaro@terminalitalia.it

