

ITALIA, HUB LOGISTICO PER L'EUROPA? ECCO PERCHE'

Castellanza, 29 maggio 2019

Saluti da parte di Columbus Logistics – Stefano Bianconi

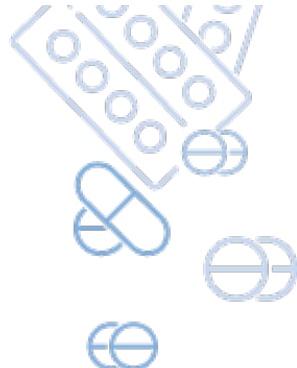
Con il patrocinio di:





LEAD LOGISTICS PARTNER

Soluzioni logistiche in full
outsourcing e in-house.



LOGISTICA FARMACEUTICA

con officina farmaceutica.



TRIPHARMA LOGISTICS

con sede a Dubai DWC
specializzata in logistica
farmaceutico e sanitario
area MENA.



BN DOCUMENT LOGISTICS

servizi di **archiviazione**
documentale.



2016

L'outsourcing logistico in house:
rischi e opportunità



2017

Pharma Logistics 4.0:
quali sfide per le altre filiere?



2018

Big Data & Digital Supply Chain:
a che punto siamo?



Università & impresa insieme per creare valore nei processi logistici



3 WORKSHOP

Incontri di aggiornamento e condivisione sulle best practice del settore sui questi temi:

- Organizzazione Magazzino
- Strategia & Outsourcing
- Trasporti e Distribuzione

300+ PARTECIPANTI

Direttori logistici, responsabili supply chain, imprenditori, fornitori di soluzioni



30+ RELATORI

- Relatori di provenienza accademica
- Professionisti del settore
- Manager d'azienda
- Fornitori di soluzioni

Università & impresa insieme per creare valore nei processi logistici



ITALIA, HUB LOGISTICO PER L'EUROPA? ECCO PERCHE'

Scelte localizzative per la logistica internazionale

Prof. Fabrizio Dallari – LIUC Business School

Con il patrocinio di:

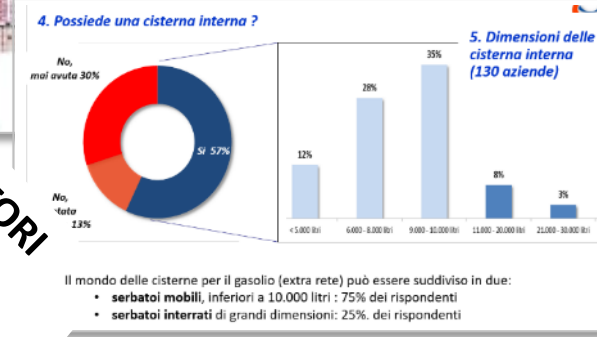
Da sempre accanto alle imprese



EVENTI & WORKSHOP



PROGETTI & OSSERVATORI

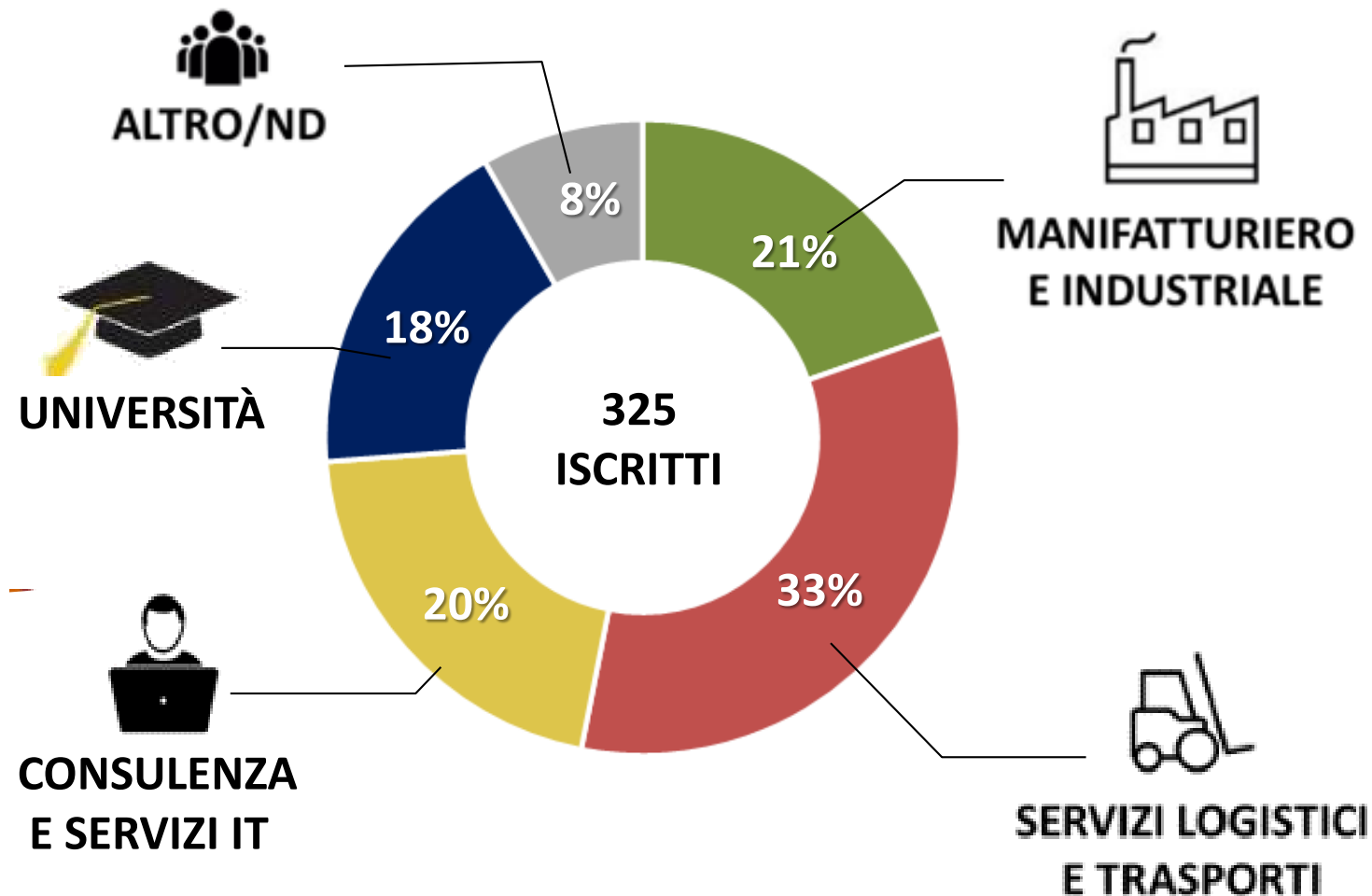


PUBBLICAZIONI

CORSI & MASTER



Chi c'è oggi al convegno?



Di cosa parliamo?



PARTE I

Perché fare logistica internazionale dall'Italia

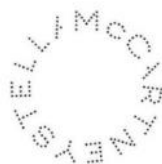
Carlo David Rosa

Group Logistics Director



Michele Migliardi

Supply Chain & Logistic Director



William Rossi

Physical Distribution Manager



Andrea Colzani

Global Transport & Logistics



Mauro Rizzolo

VP Logistics Western Europe



PARTE II

Italia, hub distributivo europeo? Sì, può, fare!

Sergio Barbarino

Research Fellow



Zeno D'Agostino

Presidente dell'Autorità



Alex Nuhi

Managing Director



Ivano Russo

Direttore Generale



Eric Veron

General Manager



Domande ai relatori?

PROGRAMMA

14.00 Registrazione

14.30 Saluti introduttivi
Federico Visconti, Rettore LIUC - Università Cattaneo
Stefano Bianconi, Columbus Logistics
Betsy Schiavoni, Presidente ALSEA

14.45 Scelte localizzative per la logistica in un contesto globale
Fabrizio Dallari, LIUC Business School

15.00 Perché conviene rimanere in Italia nonostante il mercato di riferimento sia il mondo?
Carlo David Rossa, Group Logistics Director Luxotica

15.15 Come è cambiato il network distributivo ancora prima della Brexit?
Michele Migliardi, Supply Chain and Logistic Director Stella Mc Carney

15.30 La trasformazione del ruolo del magazzino di Carpiano da domestico a internazionale
William Rossi, Physical Distribution Manager 3M

15.45 Quali prospettive per la distribuzione a partire dall'Italia, viste dalla control tower di IKEA?
Andrea Colzani, Global Transport & Logistics Services IKEA Supply AG

16.00 Distribuire in Europa attraverso un modello bi-polare: il caso Schaeffler
Mauro Rizzolo, Vice President Logistics Western Europe - Schaeffler

16.15 Tavola Rotonda: Italia, hub distributivo europeo? Si può fare
Modera: *Morena Pivetti, giornalista*
Qual è il tasso di innovazione della logistica italiana?
Sergio Barbarino, Brussels Innovation Center P&G
Presidente di Alice (UE)
I sistemi portuali nella nuova competizione globale: il caso triestino
Zeno D'Agostino, Presidente Autorità di Sistema Portuale del Mare Adriatico Orientale - Vice presidente di Espo
Italia, prossima fermata sulla nuova via della seta: Belt and Road Initiative
Ivano Russo, Direttore Generale Confindetra
Perché scegliere l'Italia per fare logistica e non solo?
Eric Veron, autore del libro "Ho scelto l'Italia"
Quali investimenti nel settore del real estate per la logistica?
Alex Nouhi, Akno Business Parks

17.15 Scenari internazionali per la logistica italiana
Marco Spinetti, Economista dei Trasporti
Presidente Interporto di Bologna

17.30 Conclusioni
Networking Cocktail presso iFAB





Vuoi fare una domanda ai relatori?
Scansiona il QR code
o vai a fianco

INFORMAZIONI
LIUC Business School
@canfora@liucbs.it
www.liucbs.it



→ DOMANDA

→ RELATORE

→ CHI SIETE

Segui l'evento su Twitter

hashtag: [#HUBItalia](#)

account: [@UniLIUC](#)

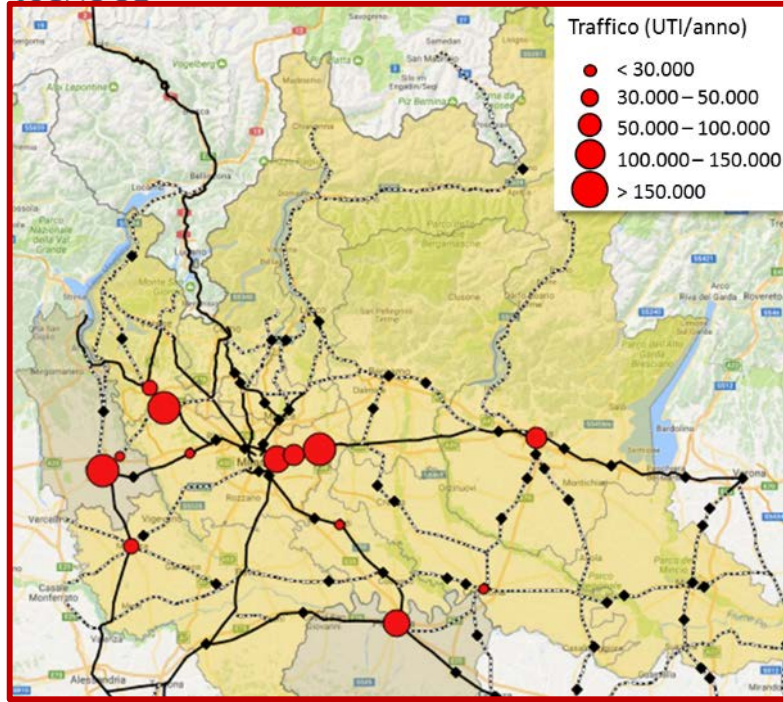


C'era una volta la «blue banana»

Blue Banana = grande area nel cuore dell'Europa che



Traffico intermodale all'interno della «Blue Banana»

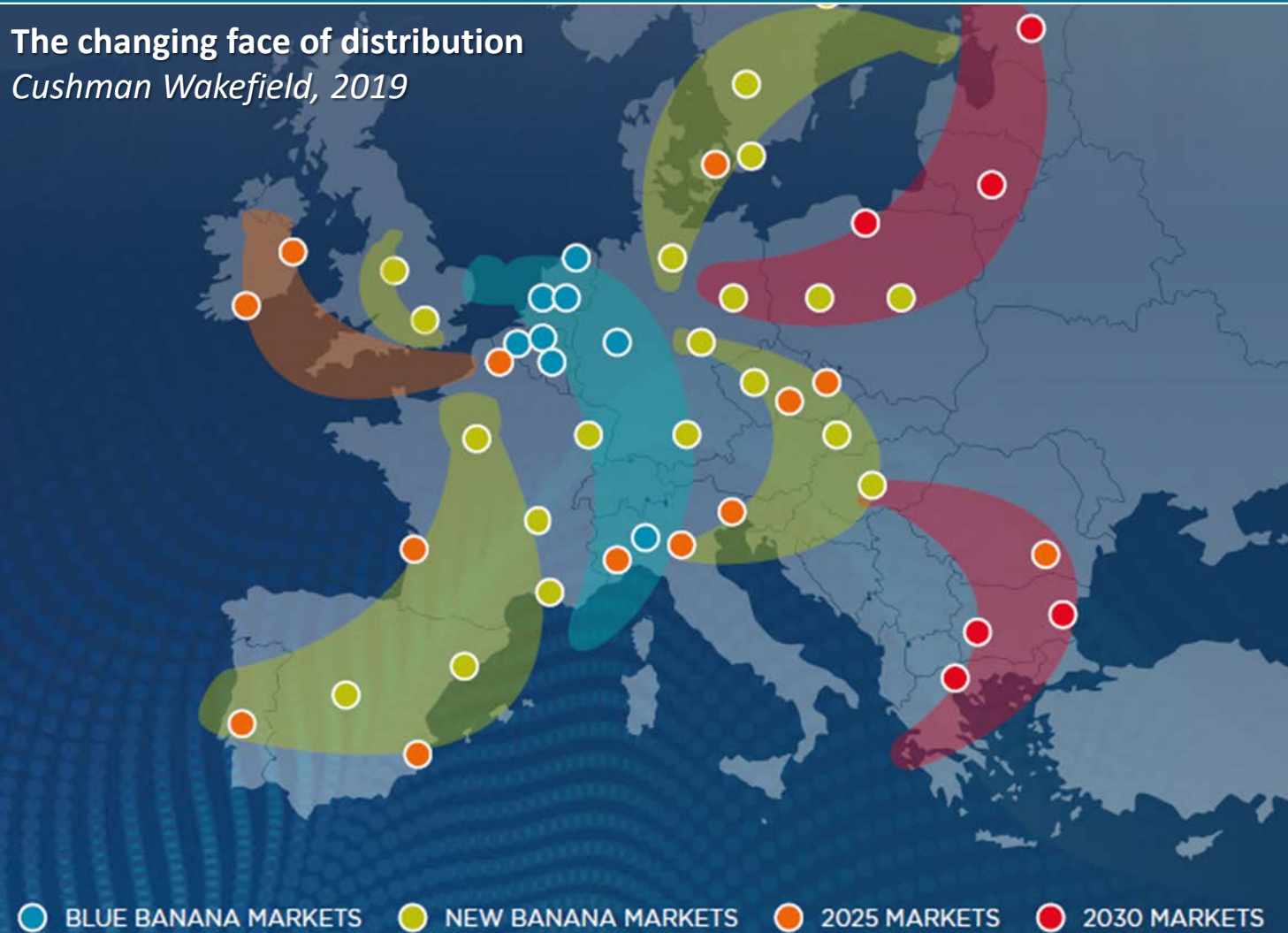


Regione Logistica Milanese
15 terminal intermodali

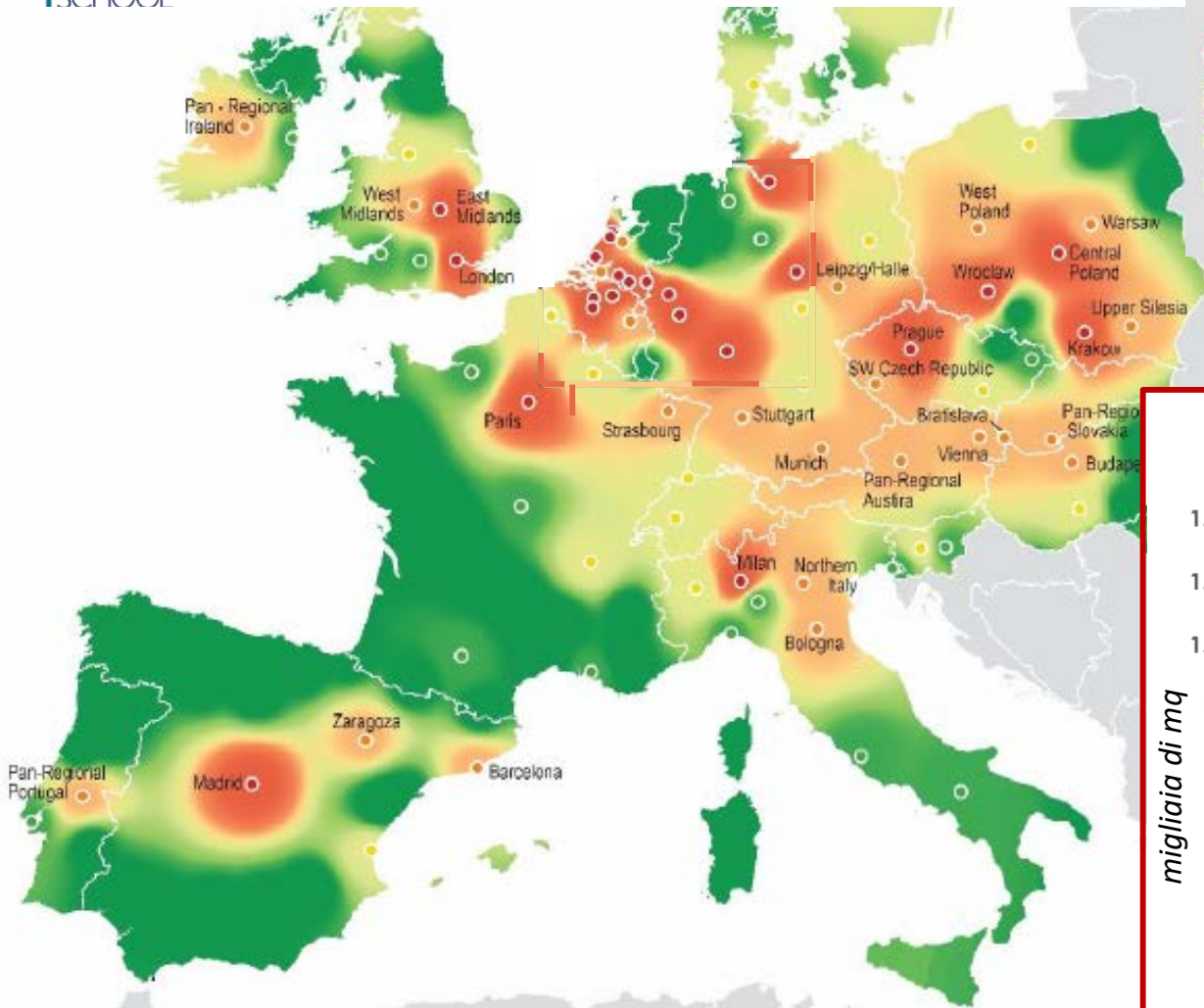


Grazie alle reti TEN-T le banane si stanno proliferando

The changing face of distribution
Cushman Wakefield, 2019



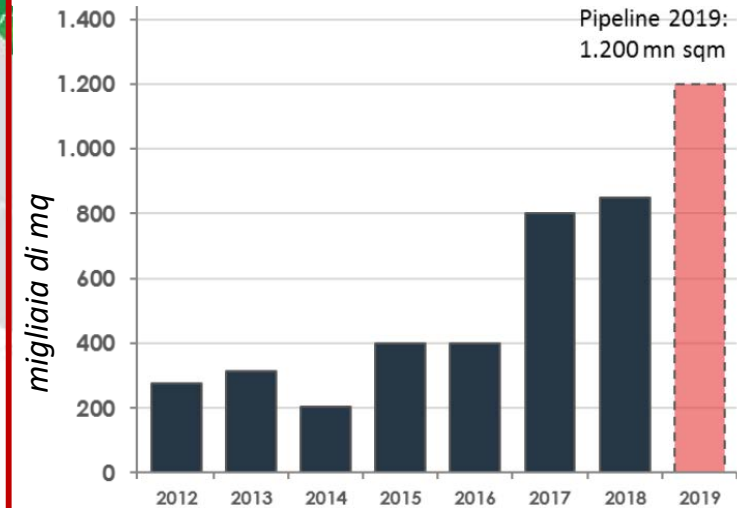
Al di là delle banane, quali sono le aree più ricercate?



Europe's most desirable locations

Prologis, 2017

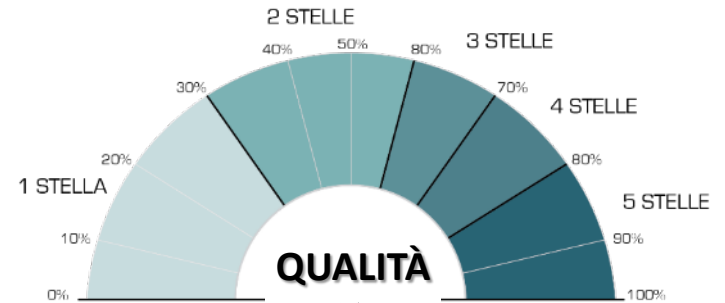
Sviluppo immobiliare Italia





web: www.osil.it

mail: osil@liucbs.it



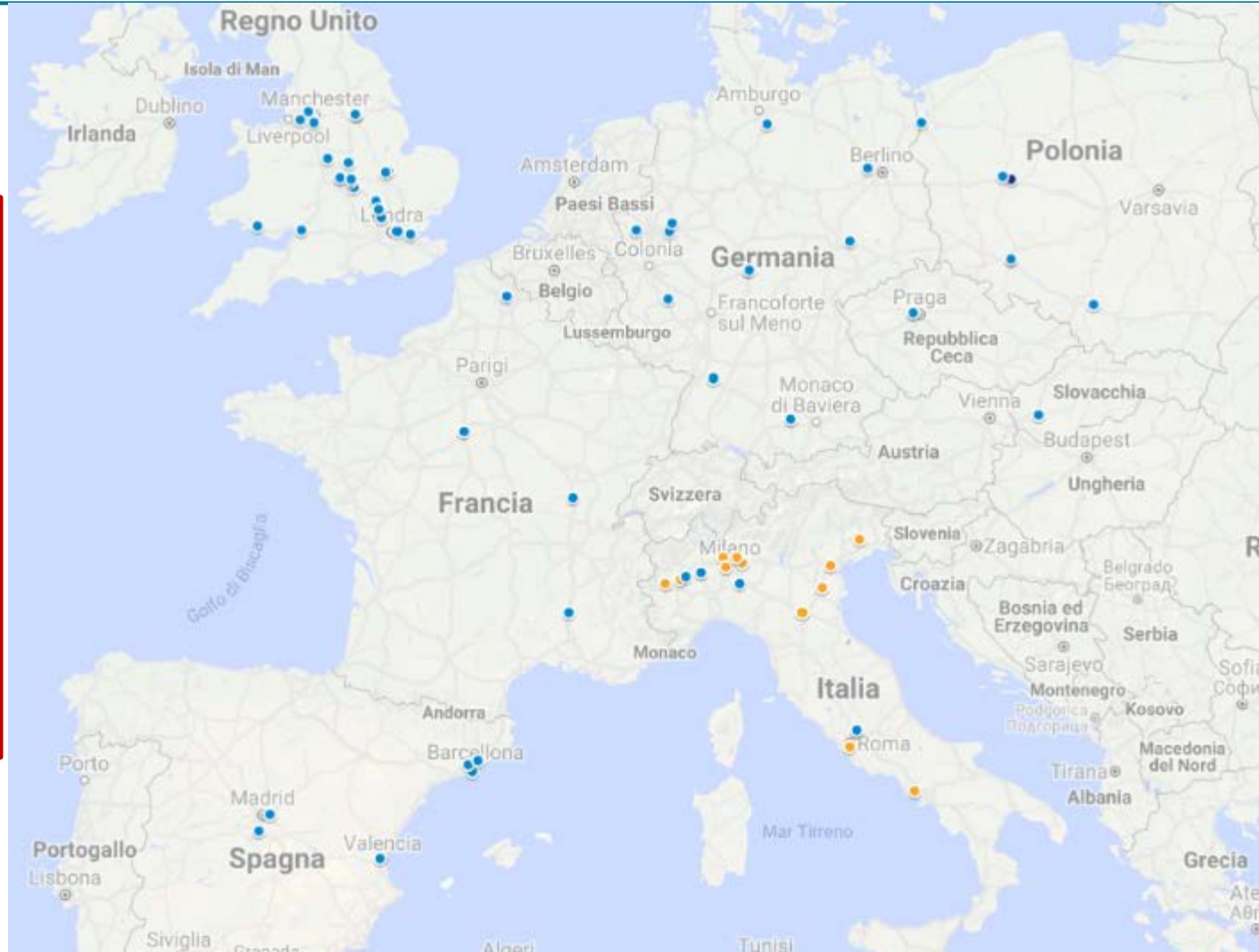
Dove stanno nascendo i magazzini di Amazon in Europa?



Località	mq
MPX5-Castel S. Giovanni (PC)	86.780
FCO1 - Passo Corese (RI)	52.080
MXP3 - Vercelli	94.320
TRN1 - Torrazza Piem. (TO)	60.000
- Avigliana (TO)	2.600
- Brandizzo (TO)	8.000
- Buccinasco (MI)	7.000
- Burago (MB)	11.000
- Calenzano (FI)	7.400
- Casirate d'Adda (BG)	8.000
- Crespellano (BO)	7.000
- Fiano Romano (RM)	4.000
- Origgio (VA)	5.000
- Roma Magliana (RM)	7.840
- Vigonza (PD)	29.480

Amazon in Italia

4 hub + 12 delivery station



Alibaba: svolta 'glocal' di AliExpress con Italia e Pmi

Dell'inviato Antonio
Fatiguso

HANGZHOU

16 gennaio 2019

18:39

NEWS



Suggerisci



Facebook



Twitter



Wang : «Siamo convinti che l'Italia abbia il potenziale per diventare nei prossimi 5-10 anni il Paese principale di riferimento per la vendita in Italia, Europa e mondo».

CORRIERE DELLA SERA

giovedì 23 maggio 2019 - Aggiornato alle 23:26



Meteo: Milano | ☀

GUCCI



Il gruppo Kering ha deciso di introdurre un nuovo modello operativo con una riorganizzazione dell'attuale network logistico negli Stati Uniti, in Asia e in Italia

LA RIORGANIZZAZIONE

Gucci, addio alla Svizzera Kering sposta 400 lavoratori in Italia (a Novara)

di Maria Silvia Sacchi

Al via i lavori di un nuovo stabilimento a Trecate (Novara), da 160mila metri quadrati dove sarà portata la logistica

La mossa fa parte di un piano industriale che entrerà a regime entro il 2023 e che prevede di spostare in Piemonte la logistica. La società ha negato che l'operazione sia collegata alla maxi-multa da 1 miliardo inflitta dal fisco italiano per il reato di «esterovestizione»

Ma come si sceglie l'assetto distributivo?

Local Optimized



**28 Domestic
Warehouses**

24h-service

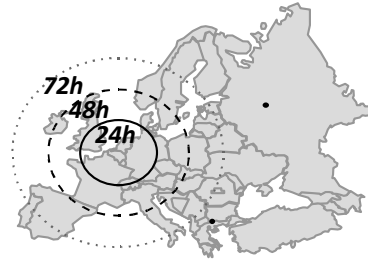
local range

customer deliveries from
local warehouse

deliveries from suppliers
to local warehouse

+ direct deliveries to customers

Central Optimized



**1 European
Distribution Center**

24h-/ 48h-/ 72h-service

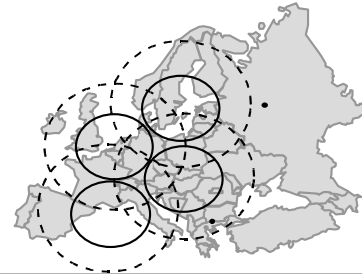
full range

customer deliveries from
central warehouse

deliveries from suppliers
to central warehouse

+ direct deliveries to customers

Regional Optimized



**3-6 Regional
Warehouses**

24h-/ 48h-service

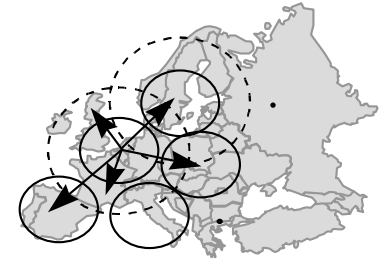
3-6x core + regional range

customer deliveries from
regional warehouses

deliveries from suppliers
to regional warehouses

+ direct deliveries to customers

Hub & Spoke Optimized



**1 Central Hub
3-6 Satellites**

24h-/ 48h-service

1x core, 3-6x regional range

customer deliveries from
regional warehouses

deliveries from suppliers to
central hub or regional
warehouses

+ direct deliveries to customers

- | | | |
|-----------------|------------------------------------------------------------------------|------------------------------|
| <p>1</p> | <p>Soddisfatti del servizio e del costo di trasporto?</p> | <p>10 aprile 2019</p> |
| <p>2</p> | <p>Consapevoli dei rischi di un magazzino poco organizzato?</p> | <p>12 giugno 2019</p> |
| <p>3</p> | <p>Convinti dell’assetto della vostra rete logistica?</p> | <p>8 ottobre 2019</p> |

- Relatori di provenienza accademica
- Professionisti e manager del settore
- Case History & esperienze di successo

Un’occasione unica per apprendere e condividere **best practice** e **criticità** inerenti i processi logistici.



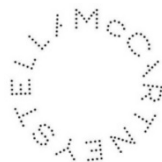
PARTE I

Perché fare logistica internazionale dall'Italia

Carlo David Rosa
Group Logistics Director



Michele Migliardi
Supply Chain & Logistic Director



William Rossi
Physical Distribution Manager



Andrea Colzani
Global Transport & Logistics



Mauro Rizzolo
VP Logistics Western Europe



PARTE II

Italia, hub distributivo europeo? Sì, può, fare!

Sergio Barbarino
Research Fellow & chair



Zeno D'Agostino
Presidente dell'Autorità



Alex Nuhi
Managing Director



Ivano Russo
Direttore Generale



Eric Veron
General Manager



ITALIA, HUB LOGISTICO PER L'EUROPA? ECCO PERCHE'

Come è cambiato il network distributivo ancora prima della Brexit ?

Michele Migliardi – WW Supply Chain & Logistics Director

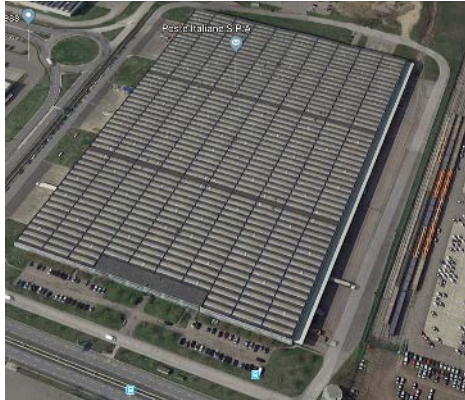
Stella Mc Cartney

Con il patrocinio di:

My Experience...20 years of supply chain management in



2002



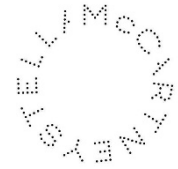
Central DC
@ Bologna Interporto
block 9.3 (BO)



2013



Central DC
@ Fiorano
Modenese (MO)



2019



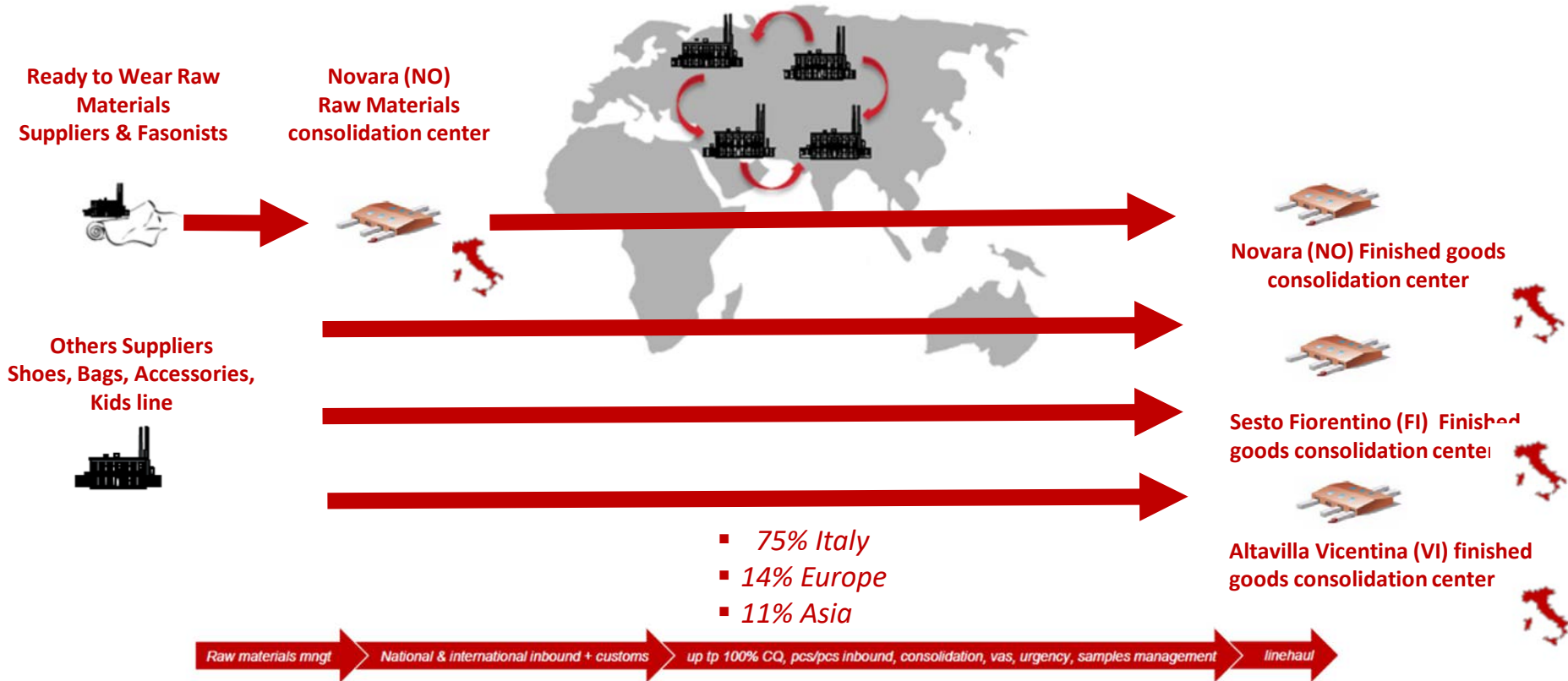
Central DC
@ Carisio (VC)

Stella McCartney – the last challenge

- Stella McCartney is the Maison born in 2001 from the collaboration of the homonymous stylist with the Kering group.
- From the first fashion show in 2001 to 2017, the company made a big breakthrough, establishing itself as one of the most famous Luxury brands in the world.
- Today the company has achieved 260 M€ of turnover, 51 Boutiques Mono- Brand, 863 Retailers and is selling online in 100 Country.
- After 17 years in partnership, Stella McCartney shall become the sole owner of her brand after buying out Kering's 50% quotes.
- The process of curve-out from Kering was expected to last two years, starting from March 2018. After one year, we made significant progress already!

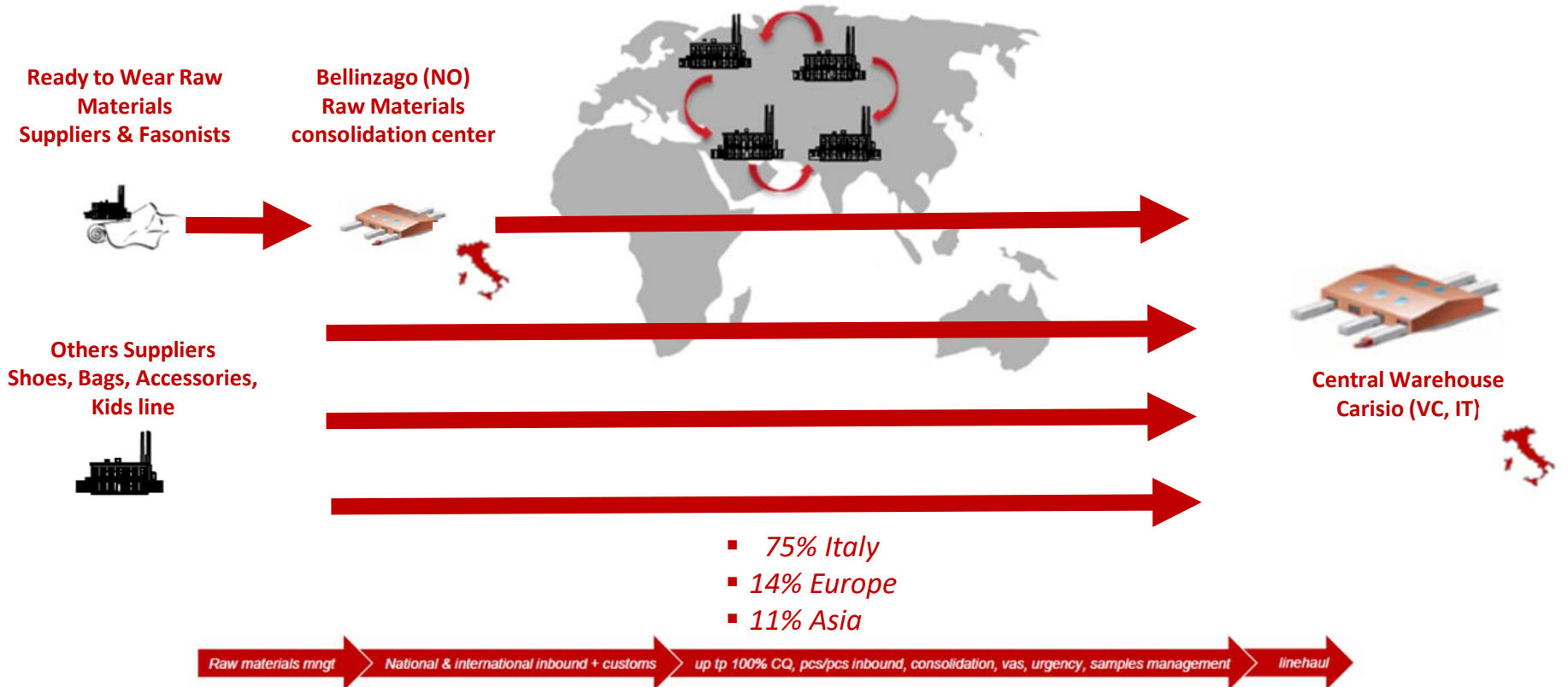
Stella McCartney – inbound

Before 1st of April 2019

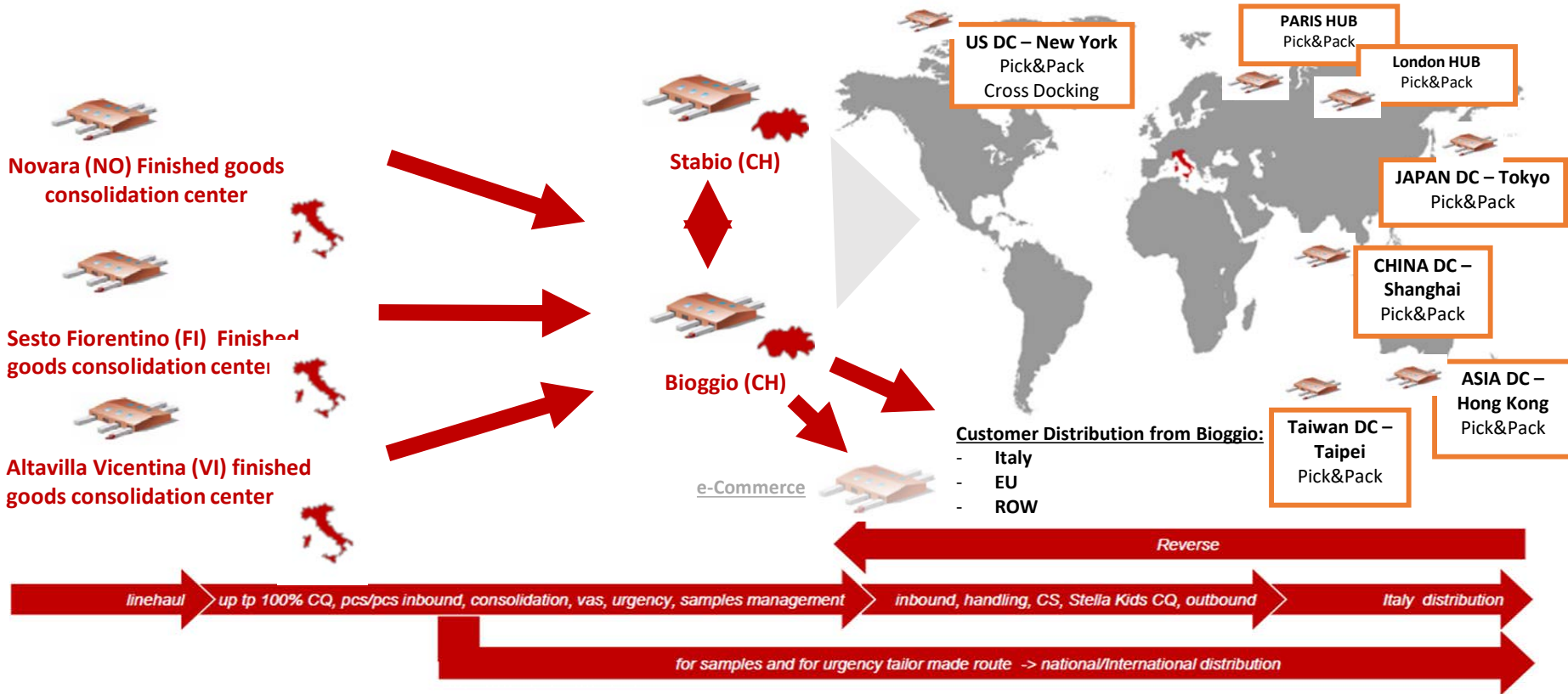


Stella McCartney – inbound

Before 1st of April 2019



Stella McCartney – outbound *Before 1st of April 2019*



Stella McCartney – outbound After 1st of April 2019

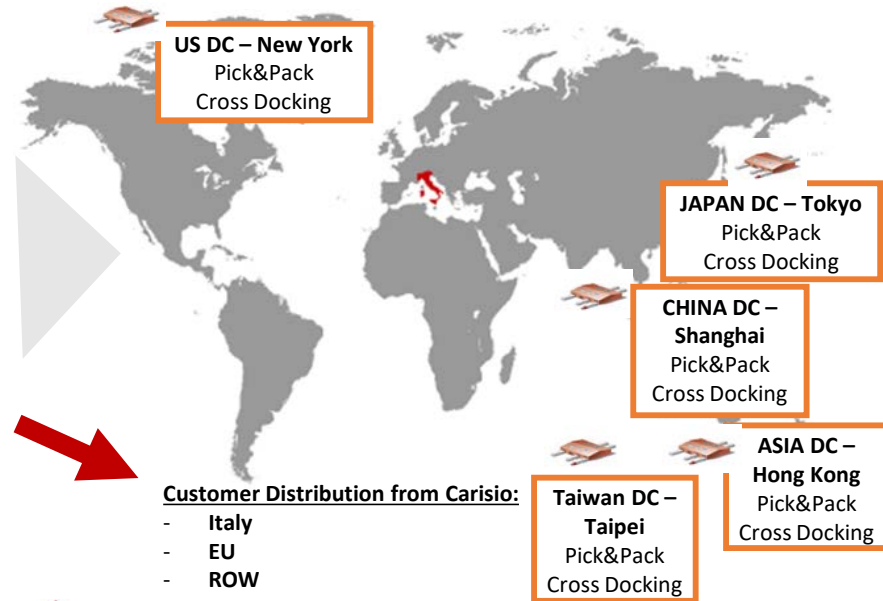
Main topics

1.631.159 pieces

- 18% GOH
- 82% Flat
- Pick&Pack
- VAS
- Quality Check
- ecomm



Central Warehouse
Carisio (VC, IT)



Customer Distribution from Carisio:

- Italy
- EU
- ROW
- ecommerce



Stella McCartney – the new logistic network - Central Warehouse in CARISIO (VC)

General Information

- Multi-Customers site
- Technologies: RF and Cabling
- IT: WMS
- Height: 10,5 m
- Area: 30.000 sqm (3 modules)
- Security System
- Sprinkler NFPA/ESFR
- 33 Docks Unload/Load
- External Vigilance
- Photovoltaic panels
- External Area: 35 mt
- Distance from Novara: 38 km



Stella McCartney – the new logistic network - Central Warehouse in CARISIO (VC)

The Warehouse has a total surface of **10.500 sqm** with the presence of a mezzanine.

PALLET RACKS

for POP and Consumables storage:

- 4 Level for Pallets Storage
- Aisle width: 3,2 mt
- Average Pallet dimensions: 120x80x160 cm



FLAT STORAGE: Cartons racks.

- 4 levels for picking
- Aisle width: 1 mt
- Average Carton dimensions: 60x50x55 cm



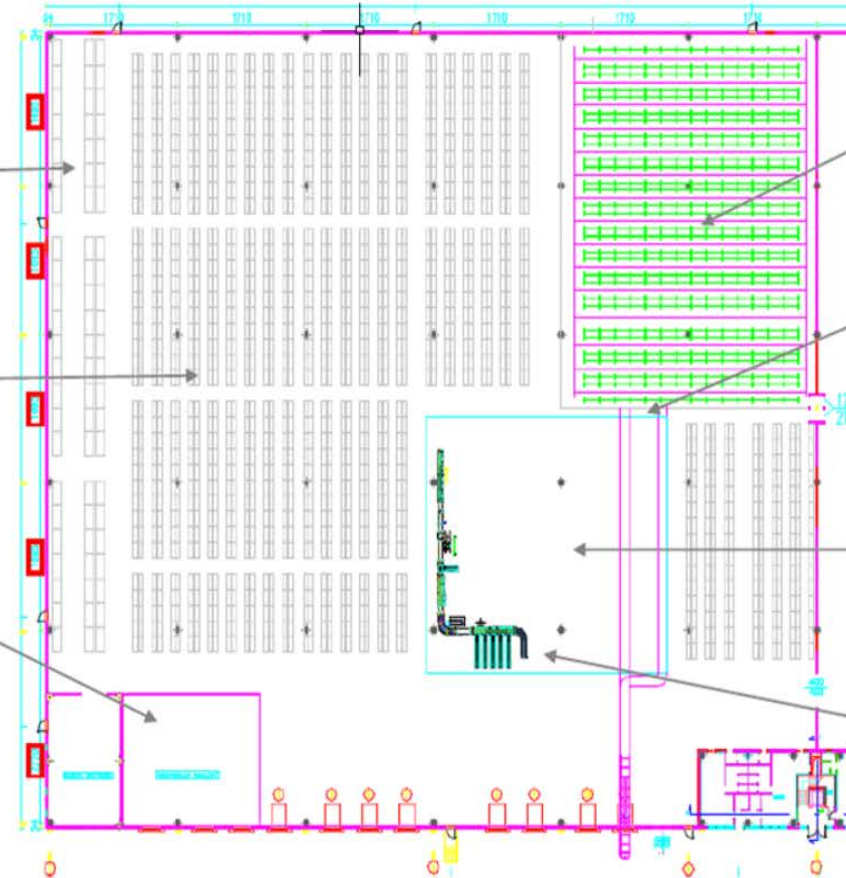
QUALITY CONTROL AREA

- Working Stations
- GOH Buffer



OTHER

- Inbound – Outbound
- Offices
- MHE charging room



MEZZANINE for GOH.

- Ground + 2 levels
- Aisle width: 1,2 mt
- GOH racks
- Average thickness of garments: 4,5 cm



ELEVATOR

for moving cartons in inbound from ground floors to the 1° and 2° levels of the mezzanine.



WORKING AREA

- Packaging Stations
- VAS activities
- Return Management



AUTOMATIC LINE with:

- Scanners;
- Balance for Cartons weight and
- automated Labelling machine;



ITALIA, HUB LOGISTICO PER L'EUROPA? ECCO PERCHE'

La trasformazione del ruolo del magazzino da domestico a internazionale

William Rossi – Physical Distribution Manager

Con il patrocinio di:

Una storia iniziata nel 1902 e di cui ne andiamo fieri



Una delle 30 aziende dell'indice Dow Jones

3M ha pagato dividendi agli azionisti
senza interruzioni da 103 anni





Oltre 55.000 prodotti



Un terzo del nostro fatturato è realizzato grazie a prodotti sviluppati negli ultimi cinque anni



91.000 dipendenti in tutto il mondo



Attività in 70 paesi e vendite in 200 paesi



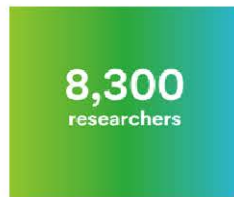
È facile imbattersi nella scienza 3M almeno 100 volte ogni giorno



Il 6% circa dei nostri ricavi viene reinvestito in ricerca e sviluppo



Negli ultimi cinque anni abbiamo investito 8,5 miliardi di dollari in ricerca e sviluppo



8.300 ricercatori nel mondo



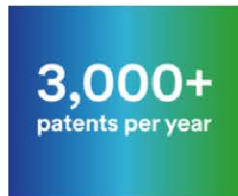
85 centri di ricerca e sviluppo distribuiti in 36 paesi



54 Customer Innovation Centre in vari paesi del mondo



Più di 117.000 brevetti registrati, di cui 1400 italiani



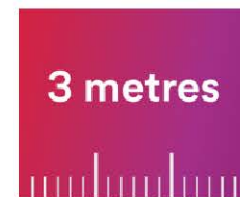
I nostri scienziati registrano in media 3.000 brevetti l'anno



200 sedi produttive in 38 paesi



Oltre 2,1 milioni di tonnellate di inquinanti eliminati dal 1975



Raramente capita che non ci sia un prodotto frutto della scienza 3M entro un raggio di 3 metri da dove ci troviamo

Sicurezza ed Industria



- Personal safety
- Adhesives and tapes
- Abrasives
- Closure and masking
- Electrical markets
- Automotive aftermarket
- Industrial minerals

Trasporti ed Elettronica



- Display materials
- Automotive and aerospace
- Electronics materials
- Commercial solutions
- Advanced materials
- Transportation safety

Salute



- Medical solutions
- Oral care
- Separation and purification sciences
- Health information systems
- Drug delivery
- Food safety

Consumo

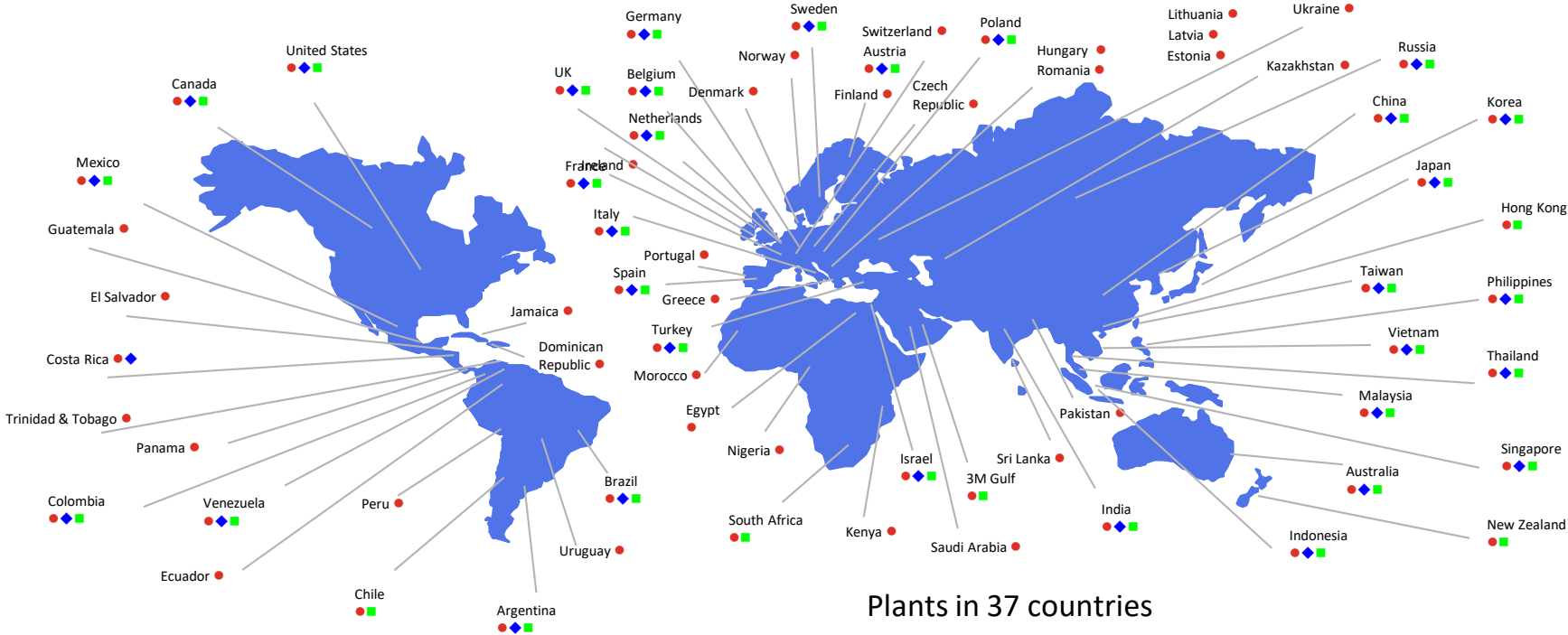


- Home improvement
- Stationery and office
- Home care
- Consumer health care

Global capabilities

Sales in 200 countries

Operations in 70 countries



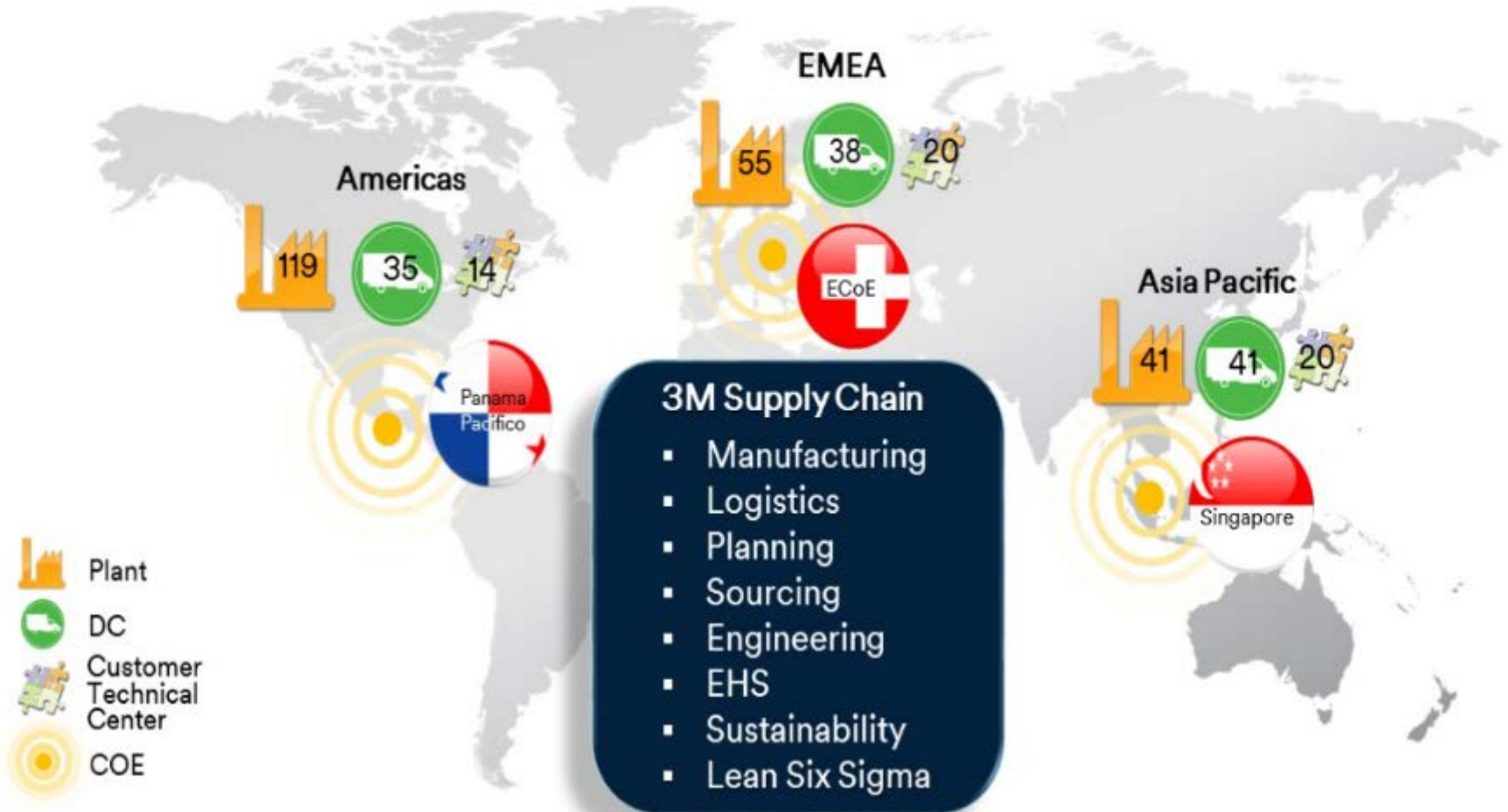
Labs in 36 countries

Plants in 37 countries

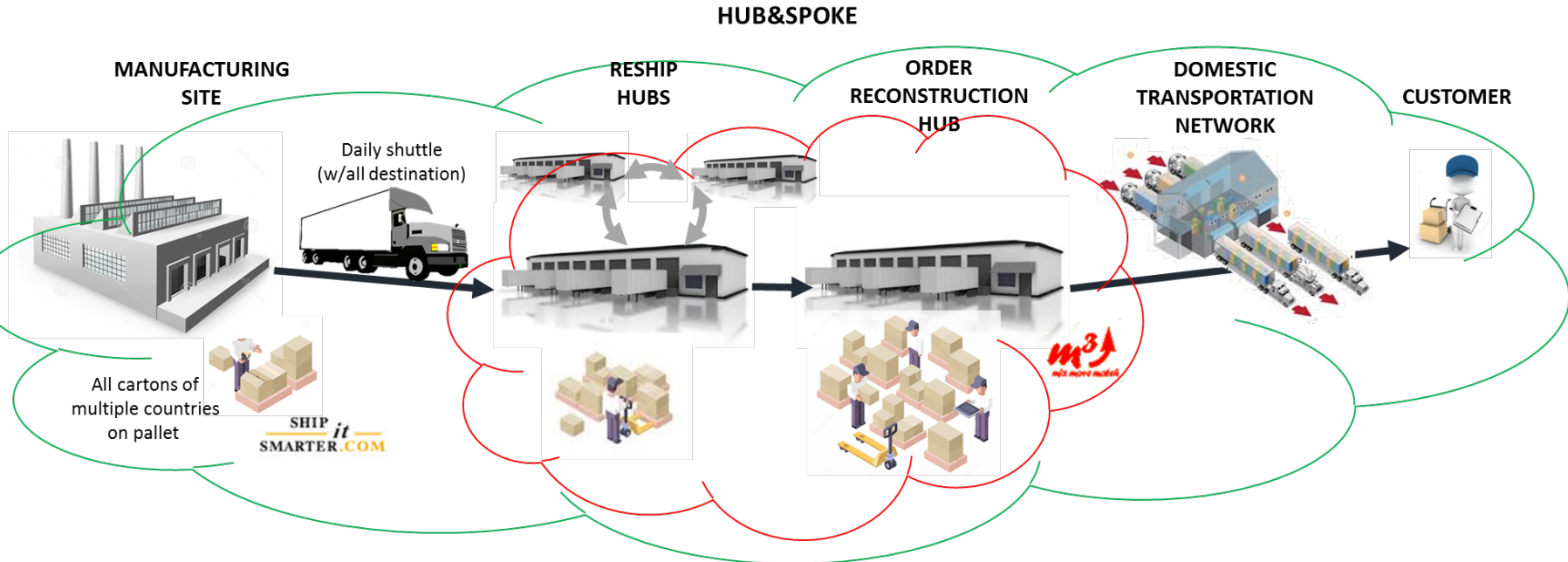
- Key
- Sales & Marketing
 - ◆ Manufacturing/Converting
 - Technical Capabilities

International Supply Chain

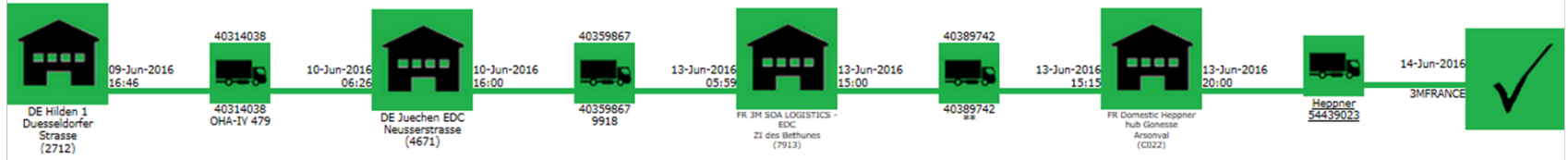
Advanced and globally coordinated supply chain



From production to customer



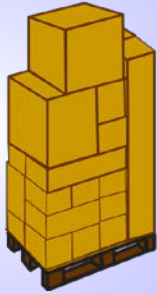
Detailed tracking - Envoi 8400493104_2016-06-09 (40304008) - Direct delivery



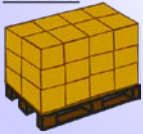
LEX (Logistic Execution) in EMEA

Daily line-hauls (FTL)
loaded with:

High Mixed Pallet

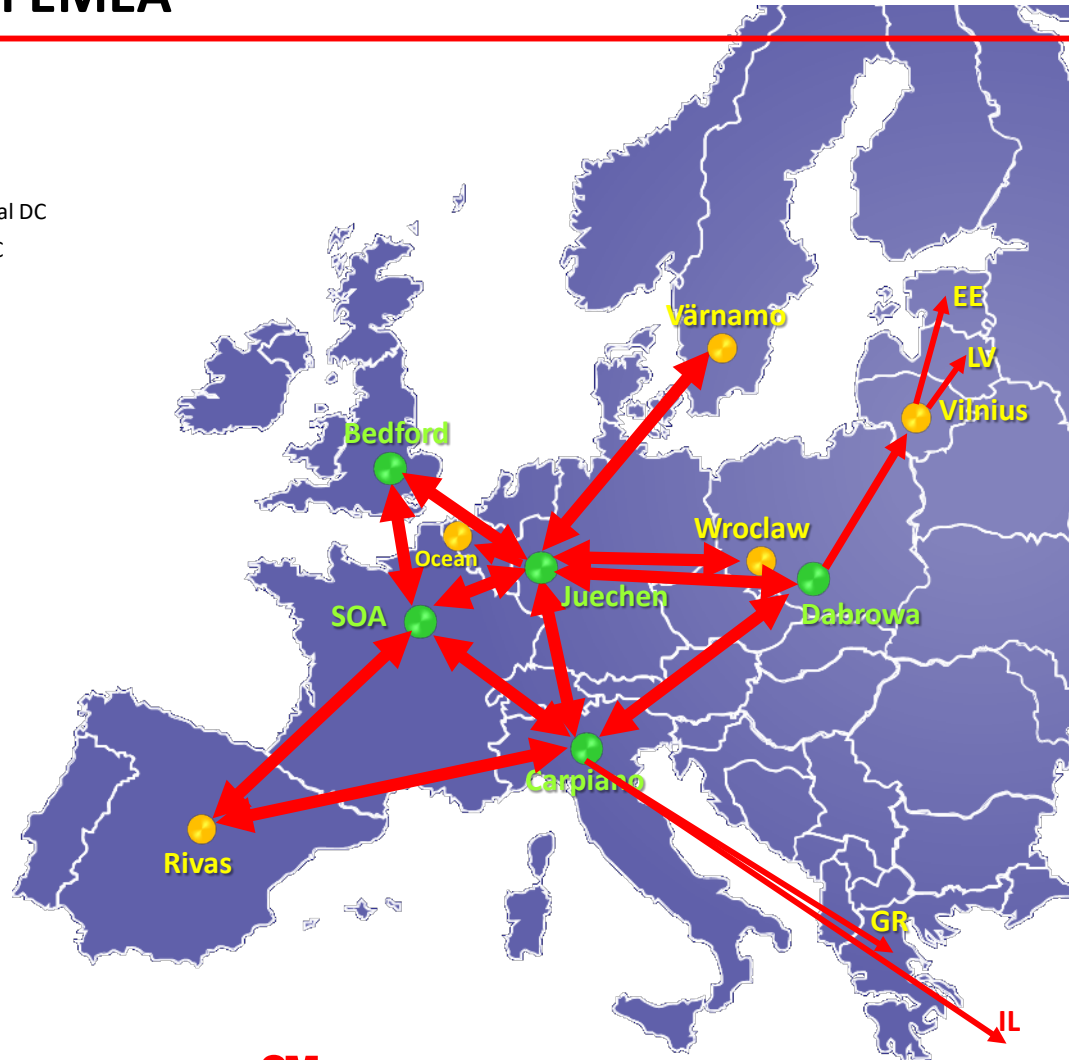


Full Pallet



Inbound: DC, plants, vendors
Outbound: reship+repl.&DS

- Local DC
- EDC



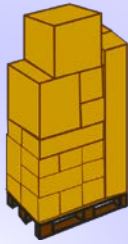
ORDER RECONSTRUCTION HUBS @3M

Inbound:

Full Pallet



High Mixed Pallet



Outbound:

Full Pallet



Consolidated Parcel



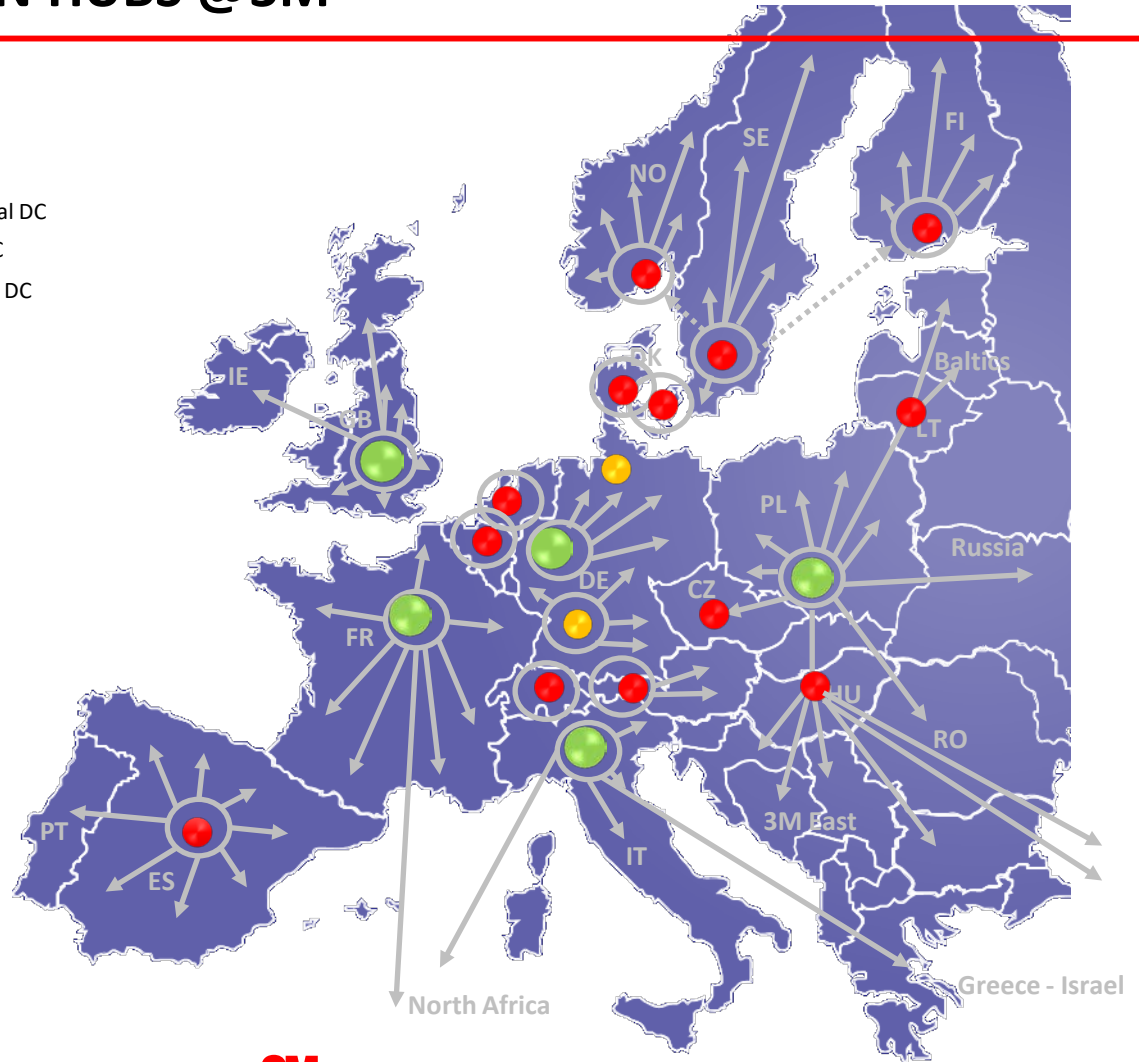
Customized Pallet



Loose Parcel



- Local DC
- EDC
- Wh DC



Carpiano Site profile



Total 3M property: sqm 110,000
DC Covered area: sqm 33,900

Operations start: April 1st, 1996
Operations: Mon-Fri, 2 shifts (6.00-21.00)

Certifications: ISO 9001/14001/13485,
IATF, Seveso Ter Authoriz.

Capacity (pallet equiv.): ~45.000

Activities: Warehousing, Transportation,
Customs, Trade compliance



Perchè Carpiano
come hub logistico 3M in EMEA
(Europe, Middle East and Africa)?

From local to EDC (European Distribution Center)

Carpiano to EDC

1. Lack of DC capacity in the EMEA DC network
2. Early entry point into the EMEA finished goods supply chain very close to 3M's sources of supply (3M plants and 3rd party suppliers) in Italy
3. Landing point for ocean inbound coming from Asia
4. North Italy is an important industrial area in Europe with significant demand
5. Excellent geographical location with good logistic operators



Carpiano to EDC

1. Lack of DC capacity in the EMEA DC network
2. Early entry point into the EMEA finished goods supply chain very close to 3M's sources of supply (3M plants and 3rd party suppliers) in Italy
3. Landing point for ocean inbound coming from Asia
4. North Italy is an important industrial area in Europe with significant demand
5. Excellent geographical location with good logistic operators



Carpiano to EDC

1. Lack of DC capacity in the EMEA DC network
2. Early entry point into the EMEA finished goods supply chain very close to 3M's sources of supply (3M plants and 3rd party suppliers) in Italy
3. Landing point for ocean inbound coming from Asia
4. North Italy is an important industrial area in Europe with significant demand
5. Excellent geographical location with good logistic operators



Il terminale della Via della Seta

4 ottobre 2017



Fonte: Adriateco – Edizioni



Carpiano to EDC

1. Lack of DC capacity in the EMEA DC network
2. Early entry point into the EMEA finished goods supply chain very close to 3Ms sources of supply (3M plants and 3rd party suppliers) in Italy
3. Landing point for ocean inbound coming from Asia
4. North Italy is an important industrial area in Europe with significant demand
5. Excellent geographical location with good logistic operators



External Realities in a Snapshot

	Population (Mill.)	GDP (Bil.USD)	GDP per capita (USD/person)
	60.7	1,851	30,478

Economic Sectors



61%
Services



37%
Industry



2%
Agriculture

Country's features

2nd Industrial power in Europe – 8th WW

2nd MFG Trade balance in Europe

10th WW for number of patents presented to EPO (European Patent Office)

Carpiano to EDC

1. Lack of DC capacity in the EMEA DC network
2. Early entry point into the EMEA finished goods supply chain very close to 3Ms sources of supply (3M plants and 3rd party suppliers) in Italy
3. Landing point for ocean inbound coming from Asia
4. North Italy is an important industrial area in Europe with significant demand
5. Excellent geographical location with good logistics providers





INDICATORI DI PERFORMANCE

- | | |
|-------------------------|------------------------------------------------|
| 1. Sicurezza sul lavoro | 2 Infortuni in 5 anni (3 settimane di assenza) |
| 2. Servizio | OTS (On Time Shipment) > 99.9% |
| 3. Costi | In costante decrescita per volume gestito |
| 4. Compliance | IATF, Seveso, 13485, 9001, 14001 |

ITALIA, HUB LOGISTICO PER L'EUROPA? ECCO PERCHE'

Prospettive per la distribuzione dall'Italia, viste dalla control tower di IKEA

Andrea Colzani – Global Transport & Logistics Services

IKEA Supply AG

Con il patrocinio di:



Agenda

- *Who we are;*
- *Piacenza City;*
- *Customs;*
- *Conclusion.*

Andrea Colzani
Global Operations Manager
Category Logistics Services
IKEA SUPPLY AG

Market Served

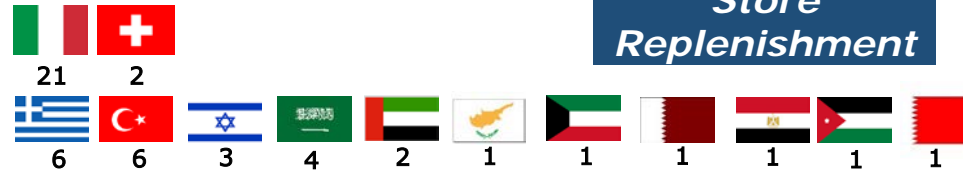
Customer Distribution



- CCD truck + Parcel
- 70% Market CDC Piacenza
- 30% Market CDC Rome



Store Replenishment



13 countries - 50 stores
Flow 50%-50% Ikea Franchisee vs NIF

Piacenza City

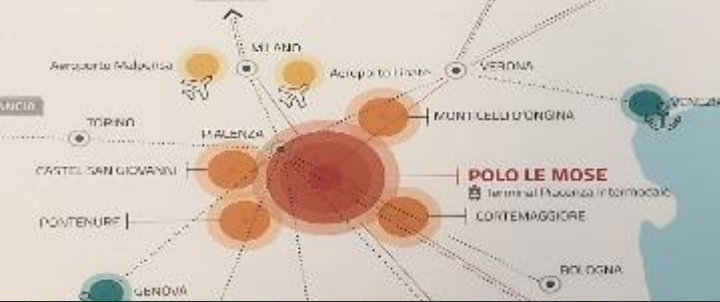


Piacenza city has 103.202 inhabitants and more than 100 churches rich of famous paintings. Piacenza boasts a county with fresh green hills, furrowed by rivers that create beautiful landscapes (Typical foods: coppa, pancetta and salami, pisarei and faso, tortelli and wines)

The city logistic approach was born for the lucky geographical position: between north and south of Italy, close to the Geneva's harbour and with many railroad connecting Piacenza to Milan, Turin and Bologna.

IKEA Piacenza Warehouses are located in an industrial area close to Piacenza city, called "POLO LOGISTICO LE MOSE".

In this area, several Logistic Companies occupy of 1.4 million m², half of which warehouses and offices, and the other half-uncovered area and internal parking. There are 14 operators with in total 17 buildings.



GENERALI REAL ESTATE 440.000m²

PROLOGIS 110.000m²

PIACENZA INTERMODALE 100.000m²

IKEA 750.000m²



CUSTOMS

Global IKEA Customs Vision

We shall be a service- and competence center within customs and trade issues with the purpose to support the business in the IKEA group, giving them better opportunities to focus upon their main activities. By delivering world class customs and trade performance in a proactive way, we will contribute to the lowest possible price at the point of sale.

Customs assets

- Bonded Warehouse E type with NCTS
- VAT WAREHOUSE with yearly volume of 60 millions vat / year
- AEO C Certificate (quality certification for customs process)
- All available customs simplifications for inbound and outbound
- Innovative project FAST CORRIDOR for digital customs process

A reliable in-house customs system platform and competence to make complex process and simple and lean for the units and country



Conclusion

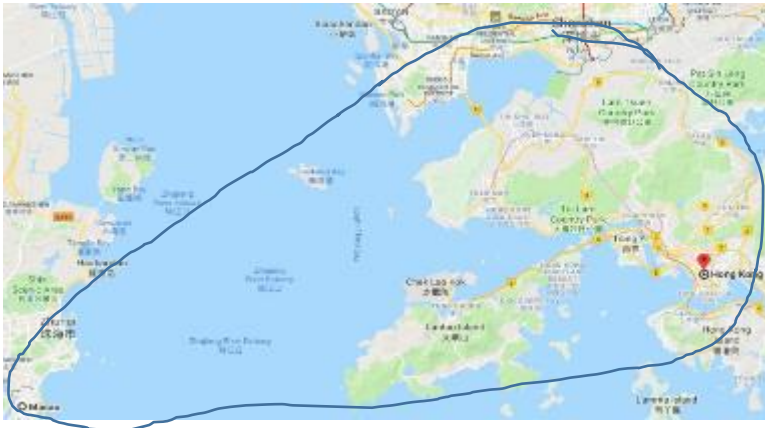
Hope this short travel gave to you an idea on how Italy it's important and the huge potential;

2 minus and 2 plus.

- **Infrastructure, not only the physical one but also the digital;**
- **Huge bureaucracy and formal processes too long.**

Example from the control Tower.

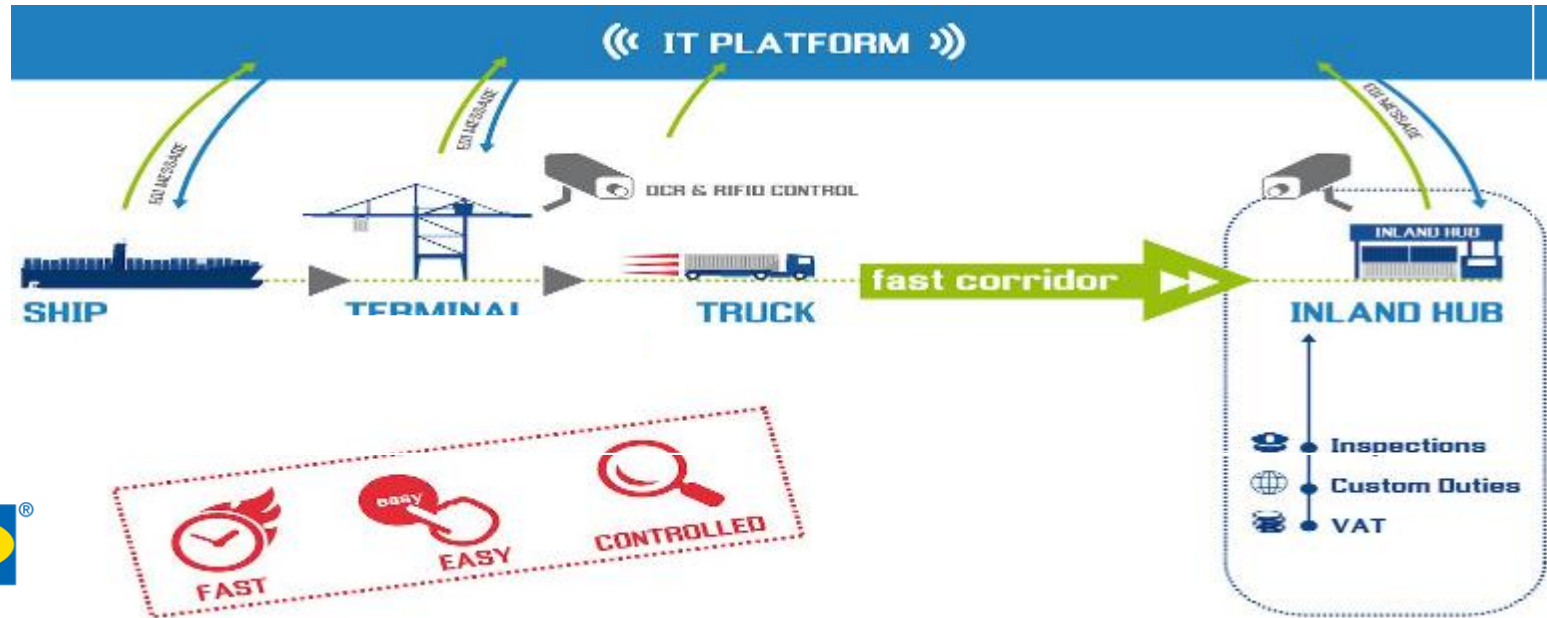
New commercial area in South China: Shenzen -Hong Kong – Macau and bridge connection Hong Kong - Macau



Conclusion

2 minus and **2 plus.**

- + **Authorities collaboration to find out new solutions to smooth the processes (FAST CORRIDORS);**
- + **Ability in find solutions, problem solving orientation.**





TACK!

Info: andrea.colzani1@inter.ikea.com



ITALIA, HUB LOGISTICO PER L'EUROPA? ECCO PERCHE'

Distribuire in Europa attraverso un modello bi-polare: il caso Schaeffler

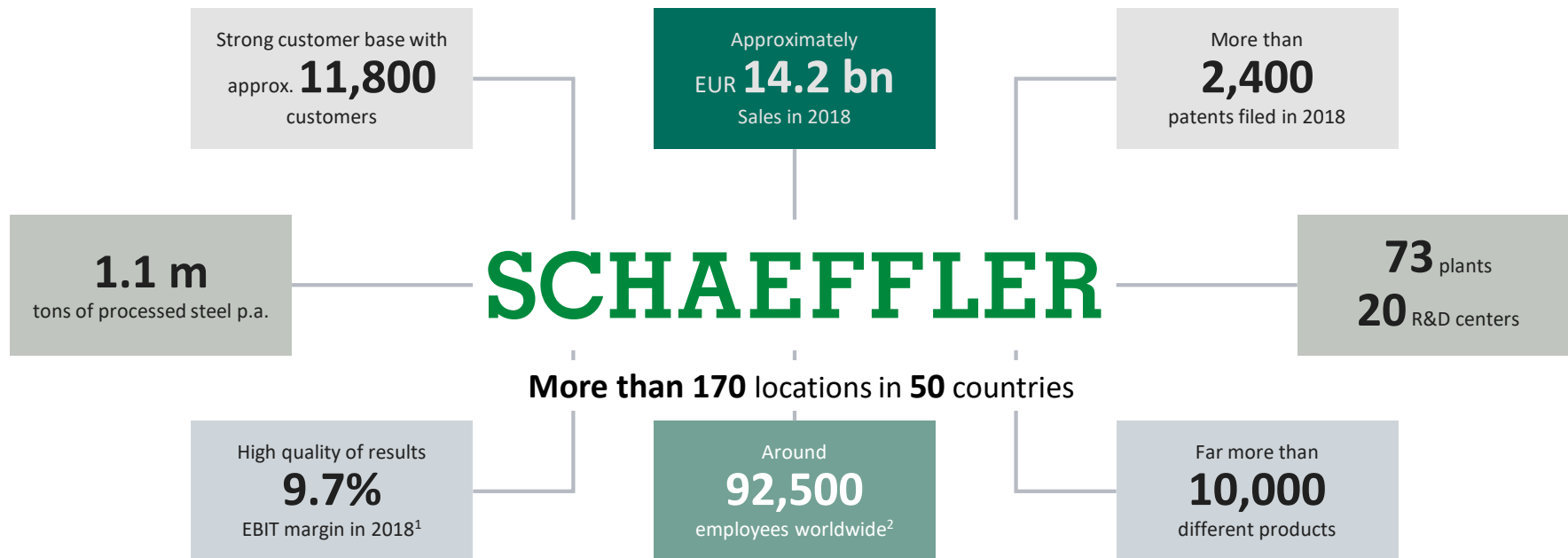
Mauro Rizzolo – Vice President Logistics Western Europe

Schaeffler

Con il patrocinio di:

Schaeffler in facts – strong starting point

SCHAEFFLER



¹ Before one-off effects | ² As at December 31, 2018

3 divisions – automotive OEM, Automotive Aftermarket and Industrial

SCHAEFFLER

Automotive OEM | Systems



Engine Systems



Transmission Systems



Chassis Systems



Hybrid and Electrical Drive Systems

Automotive Aftermarket | Segments



Passenger Cars



Light Commercial Vehicles



Heavy Commercial Vehicles



Tractors & Agricultural Vehicles



Services

Industrial | Sector Clusters



Wind



Raw Materials



Aerospace



Railway



Offroad



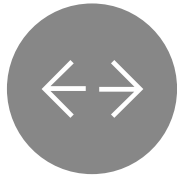
Two Wheelers



Power Transmission



Industrial Automation



Wide Product Range:

- Dimension
- Weight
- Handling

	Ball bearings	Cylindrical roller bearings	Spherical roller bearings	Tapered roller bearings	Needle roller bearings	Linear technology	Plain bearings	Systems	Mechatronics
Standard product business									
Customized product business									
	Bicycle	Construction machine	Wind turbine rotor bearing	High speed train	Gearbox	Tooling machine	Marine	Tooling machine	Tooling machine



High Market Expectation:

- ▶ Delivery performance > 95%
- ▶ Supply customers within 48h/72h (24 h Express) starting from order entry (in the warehouse system) for core items
- ▶ 100% availability for Core items
- ▶ High logistics reliability with a 0 mistake and increased time to market
- ▶ Structured approach to increase flexibility
- ▶ Transparent steering of customer orders through to the plants
- ▶ 100% fulfillment of the customer requirements (for example: packaging, labels, documents, ..., and more)
- ▶ Setup a common Return Process/ Return-Logistics
- ▶ Green Logistics (Reduce carbon footprint)

Analysis of the current situation

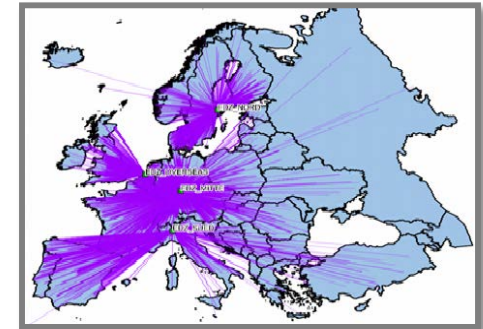
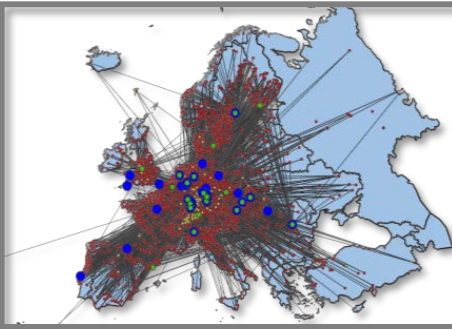
- Deeply analysis of processes, sub-processes, material flow
- Description of every single details

werkhaeet	Anteil Gesamt	Fortschritt	To Do
A0_DE			
A0_Daten			
Summary			
Werkhaeet			
A1_inboundIntern			
A2_inboundExtern			
A3_sendeProvider			
A4_packing			
A5_inwarders			
A6_inclucks			
A7_werkstation			
A8_Raumspiegel			
Gesamt	Gesamt		

Global footprint

Data analysis

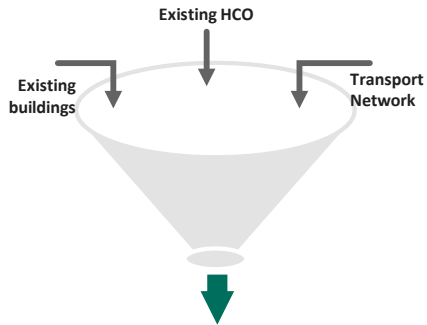
- Analysis of collected data using professional software
- Proposal of solution given center of gravity



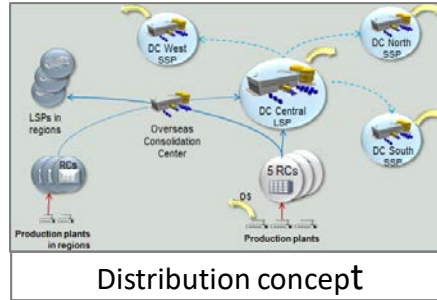
Network – 1° step

Comparison

- Existing Buildings
- Existing Employees
- Existing Transport Network



Network – 2° step



Network - finalisation



- 3 EDCs
- New Buildings
- Distribution & replenishment concept
- Countries concept
- Performances



Key figures

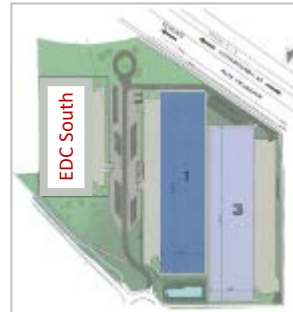
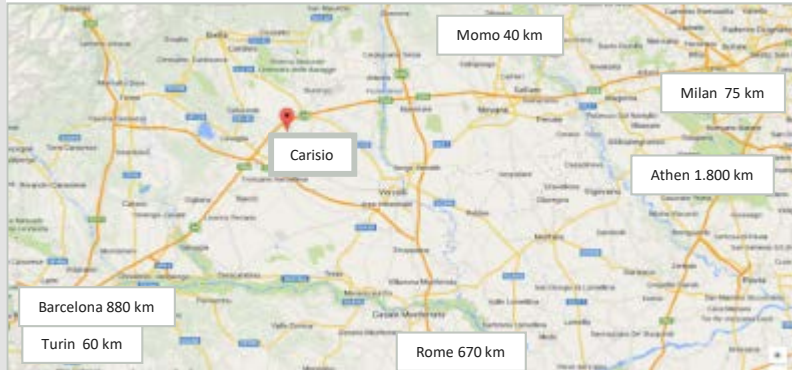
- 94.000 m²
- «Product to man» concept
- Miniload 12 alleys – 86.000 slots
- Pallet 7 alleys – 29.000 slots
- 10 Deco stations
- 20 Pick & Pack stations
- 9 Inbound / 11 Outbound docks
- Automated internal transfer
(conveyor & vehicles)

EDC Central tasks

SCHAEFFLER

- Receiving point for all products
- Daily Deliveries to EDCs
- Daily deliveries to selected countries
- Daily deliveries MTO
- High quality level
- Meeting customer requirements





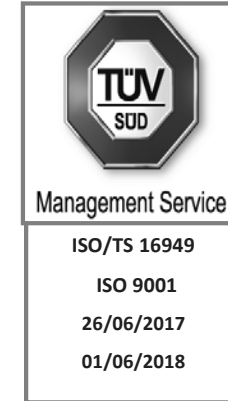
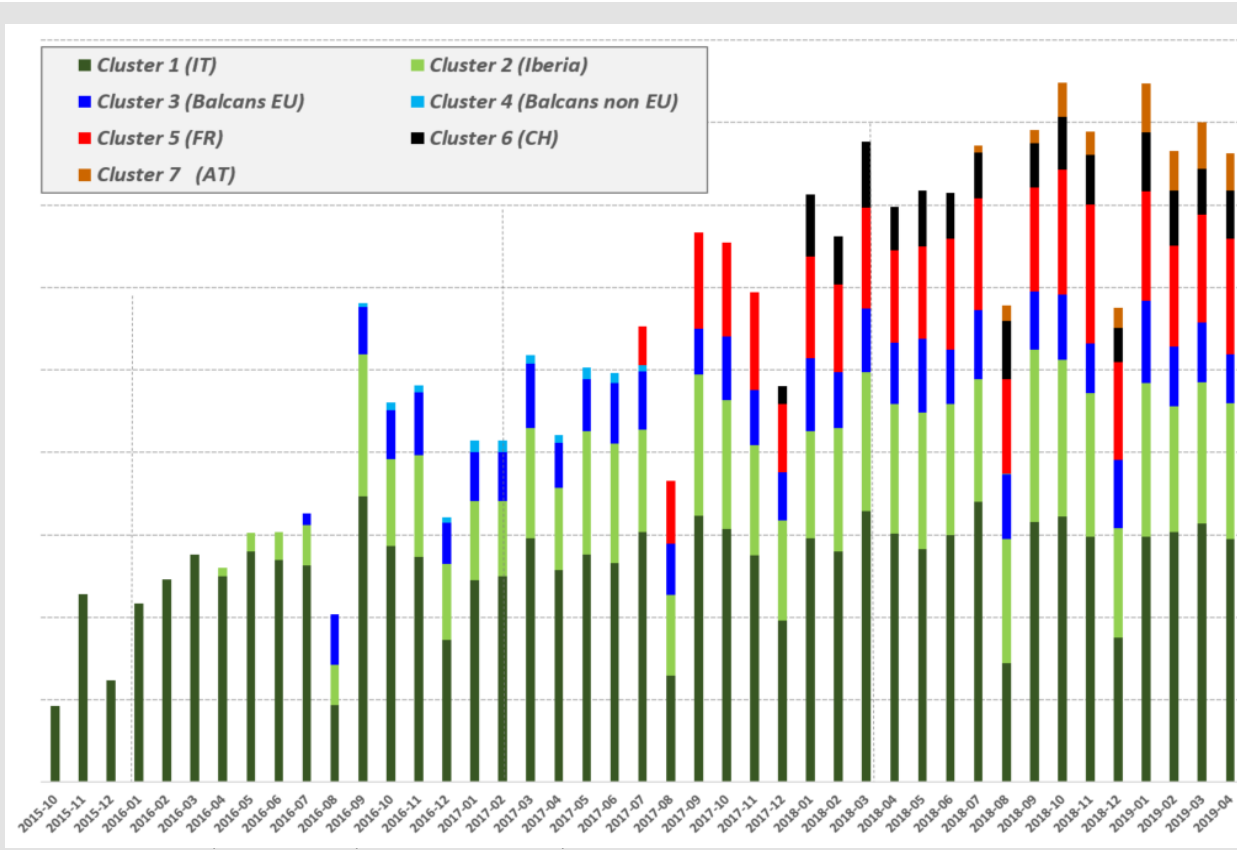
Key figures

- 17.000 m²
- «Product to man» concept
- Miniload 6 alleys – 45.000 slots
- Automated Sequencer 1.300 slots
- Pallet manual operated – 3.500 slots
- 3 Deco stations
- 12 Pick & Pack stations
- 17 docks
- Automated conveyor system

- Daily deliveries to selected countries
- Daily deliveries «Transit Process»
- High quality level
- Meeting customer requirements



EDC South results



Perché investire in Italia?

SCHAEFFLER

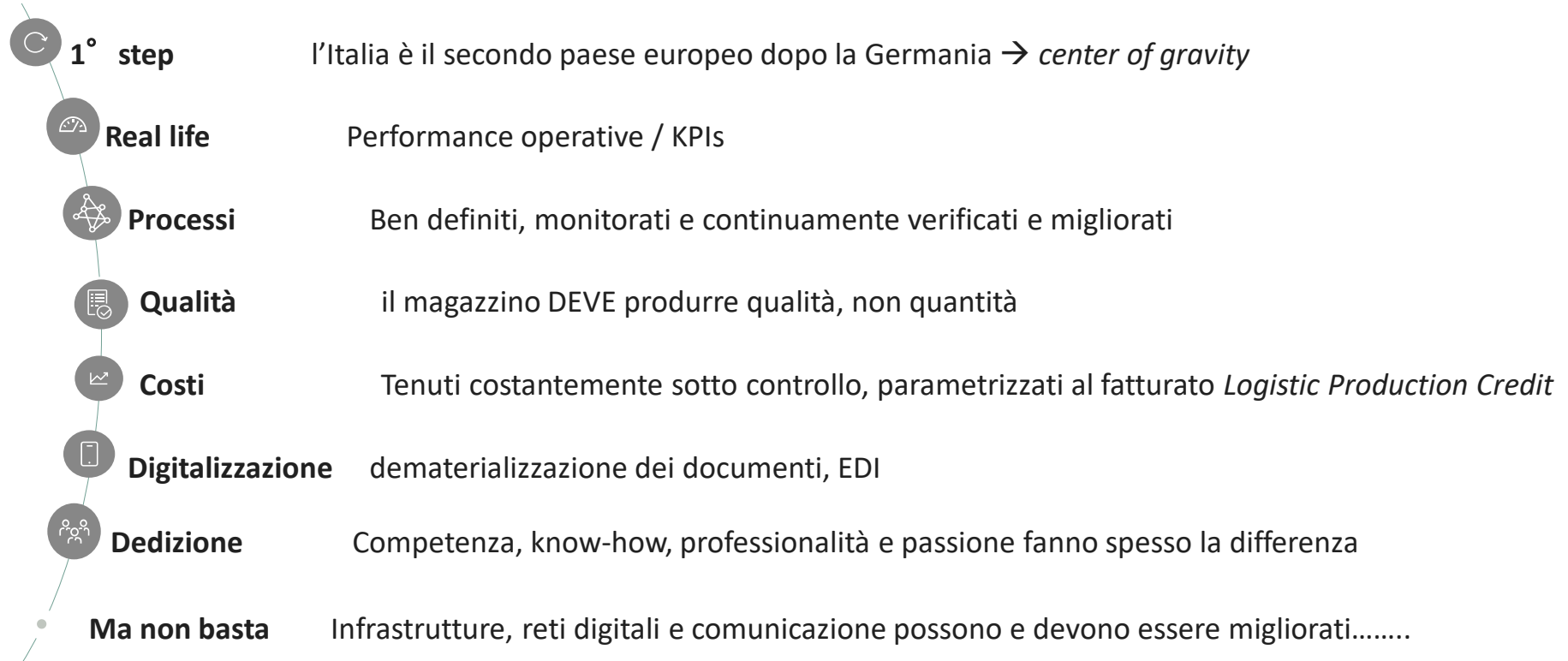


Tavola rotonda: *Italia, hub distributivo europeo? Sì, può, fare!*

Moderata:

Morena Pivetti

giornalista Fortune Italia



PARTE II

Italia, hub distributivo europeo? Sì, può, fare!

Sergio Barbarino

Research Fellow & chair



Zeno D'Agostino

Presidente dell'Autorità



Alex Nuhi

Managing Director



Ivano Russo

Direttore Generale



Eric Veron

General Manager



Tavola rotonda: *Italia, hub distributivo europeo? Sì, può, fare!*



L'Italia è strategica per gli investimenti logistici perché è un importante paese di consumi, di industria e di scambi commerciali. Questo implica nuove infrastrutture per accompagnare lo sviluppo dell'e-commerce, dare supporto al sistema industriale e fluidificare gli scambi con l'Europa



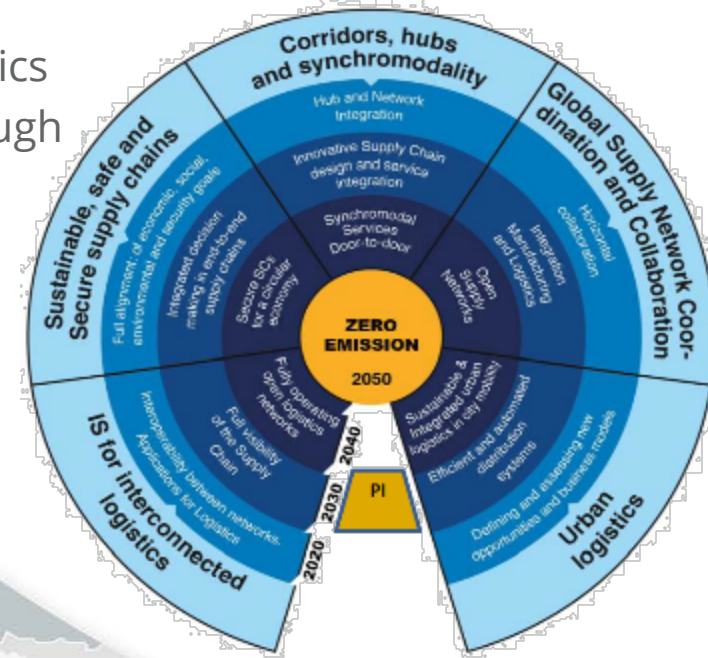
**Italia, hub logistico per l'Europa?
Ecco perché**



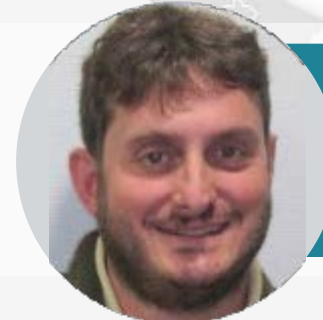
Eric Veron
Vailog-Segro

Tavola rotonda: *Italia, hub distributivo europeo? Sì, può, fare!*

ALICE:
Alliance for Logistics
Innovation through
Collaboration
in Europe



Italia, hub logistico per l'Europa? Ecco perché



Sergio Barbarino

Brussels Innovation Center, P&G
Presidente di Alice (UE)

Tavola rotonda: *Italia, hub distributivo europeo? Sì, può, fare!*

“ I grandi temi legati alla logistica stanno rompendo gli argini dell’angusto recinto per addetti ai lavori per divenire oggetto di dibattito diffuso sui media ma anche in sede politico istituzionale. Dovremo essere bravi a cogliere questa fase per consolidare analisi, idee e proposte sulla funzione strategica della logistica per il nostro Paese.

**Italia, hub logistico per l’Europa?
Ecco perché**



Ivano Russo
Direttore Generale, Confetra

Tavola rotonda: *Italia, hub distributivo europeo? Sì, può, fare!*

“ I sistemi portuali nella nuova
competizione globale: il caso triestino. ”

**Italia, hub logistico per l'Europa?
Ecco perché**



Zeno D'Agostino
*Presidente Autorità Porto di
Trieste Vicepresidente di Espo*

Da Bettembourg a Budapest Con i nostri treni si arriva in tutta Europa



Italia
Brescia, Milano smistamento, Novara

Austria
Collegamenti diretti:
Villach Süd CCT, Graz Süd CCT, Salzburg Hbf CCT, Salzburg Hbf, Wels
Collegamenti da Villach Süd CCT:
Linz Stadthafen, Wien Freudenau, Wien Süd, Wolfurt CCT, Rostock

Germania
Collegamenti diretti:
München, Burghausen, Ludwigshafen, Frankfurt, Giengen, Köln, Duisburg
Collegamenti da München Riem:
Köln, Duisburg, Leipzig, Berlin, Hamburg, Kiel-Gotenburg

Lussemburgo
Bettembourg

Belgio
Zeebrugge

Ungheria
Budapest Mahart

Slovacchia
Dunajská Streda

Repubblica Ceca
Ostrava or Paskov

Hull

Zeebrugge

Duisburg

Köln

Frankfurt

Ludwigshafen

Karlsruhe

Giengen

München

Wolfurt

Brescia

Milano

Novara

Hamburg

Kiel

Rostock

Berlin

Leipzig

Burghausen

Salzburg

Wels

Linz

Villach

Wien

Graz

Ostrava

Paskov

Dunajská Streda

Budapest

Trieste

Tavola rotonda: *Italia, hub distributivo europeo? Sì, può, fare!*

“La logistica in Italia rappresenta ora più che mai un’opportunità di investimento sicuro e duraturo nel tempo. Gli investimenti si focalizzano in primis su Business Park di classe A con dimensioni minime di 100.000 mq, in prossimità dei principali snodi autostradali.”

**Italia, hub logistico per l’Europa?
Ecco perché**



Alex Nuhi
Akno Business Parks

ITALIA, HUB LOGISTICO PER L'EUROPA? ECCO PERCHE'

Scenari internazionali per la logistica italiana

Marco Spinedi – Economista e Presidente dell'interporto di Bologna

Con il patrocinio di:

Alcuni punti fermi in uno scenario in forte movimento

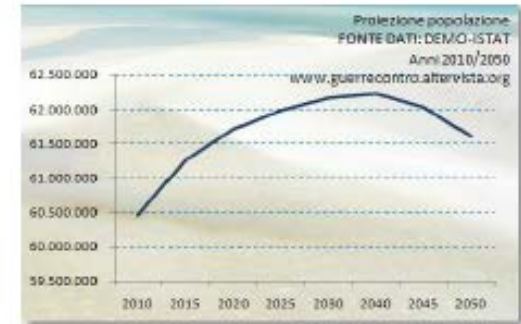
Guerre Commerciali



Bassa crescita



Demografia



Tecnologia



Trasporti & Ambiente



I trend di lungo periodo del PIL: da crescita a stasi

Tassi di crescita annuale del PIL (Periodo 1965 – 2020; Proiezioni 2024)

Paesi:	1965-1980	1980-1990	1990-2000	2000-2010	2010-2020	2024
Italia	4,3	2,4	1,5	0,3	0,4	0,6
Francia	4,0	2,2	1,9	1,3	1,2	1,5
Germania	3,3	2,1	1,8	1,0	1,9	1,2
Regno Unito	2,3	3,1	2,8	1,6	1,6	1,6
Polonia	n.d.	1,8	4,7	4,4	3,5	2,8
Spagna	4,6	3,1	2,7	2,4	1,2	1,6
Giappone	6,4	4,1	1,3	0,9	1,4	0,5
USA	2,7	3,4	3,6	1,9	2,4	1,6
Cina	5,4	10,1	10,0	10,8	7,5	5,5
Turchia	6,2	5,1	3,9	4,7	4,3	3,5
M. O. e N.A.	6,7	0,5	3,8	4,7	3,2	2,8

Fonte: World Bank, World Development Report, numeri vari ed IMF, World Economic Outlook.

SLOWBALISATION ?

**CROSS-COUNTRY
CONVERGENCE?**

Commercio estero “motore” dell’economia

Dov’è la ricchezza?

**Francia
Germania
Italia
Regno Unito**

**Popolazione: 270 mil.
PIL: 11.695.940
ΔPIL 2010-17 + 1,4%**



**Medio
Oriente &
Nord Africa**

**Popolazione: 162 mil.
PIL: 3.439.624
ΔPIL 2010-17: + 3,5%**

Dov’è la crescita ?

**Bulgaria
Polonia
Rep. Ceca
Rep. Slovacca
Romania
Turchia
Ucraina**

**Popolazione: 205 mil.
PIL: 2.558.716
ΔPIL 2010-17: + 4,9%**

Osservazioni conclusive

Bassa crescita e turbolenze: quali conseguenze su *supply chain* e scelte localizzative nella logistica?

- UNCTAD stima vantaggi commerciali per la UE per 71 miliardi di US\$ a seguito della guerra commerciale USA – Cina
- Forte selettività a favore della qualità/molteplicità dei servizi offerti dal territorio nelle scelte di insediamento
- Grande attenzione ai settori/merceologie ed alle aree geografiche più dinamiche, cogliendone le opportunità per primi
- Capacità di convivere con l'incertezza e l'imprevedibilità di una realtà in continuo mutamento con spirito di adattamento

Grazie per l'attenzione

Con il patrocinio di: