
“an integrated network of Ports
to support the competitiveness of the Italian industry”

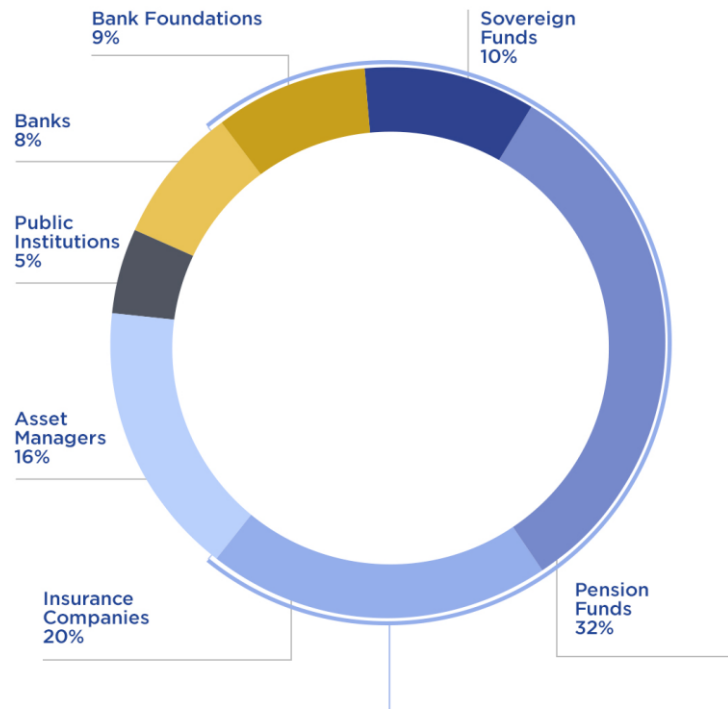
Trieste, 29 Maggio 2024 - Paolo Cornetto, CEO FHP

Who we are



Fondi Italiani per le Infrastrutture

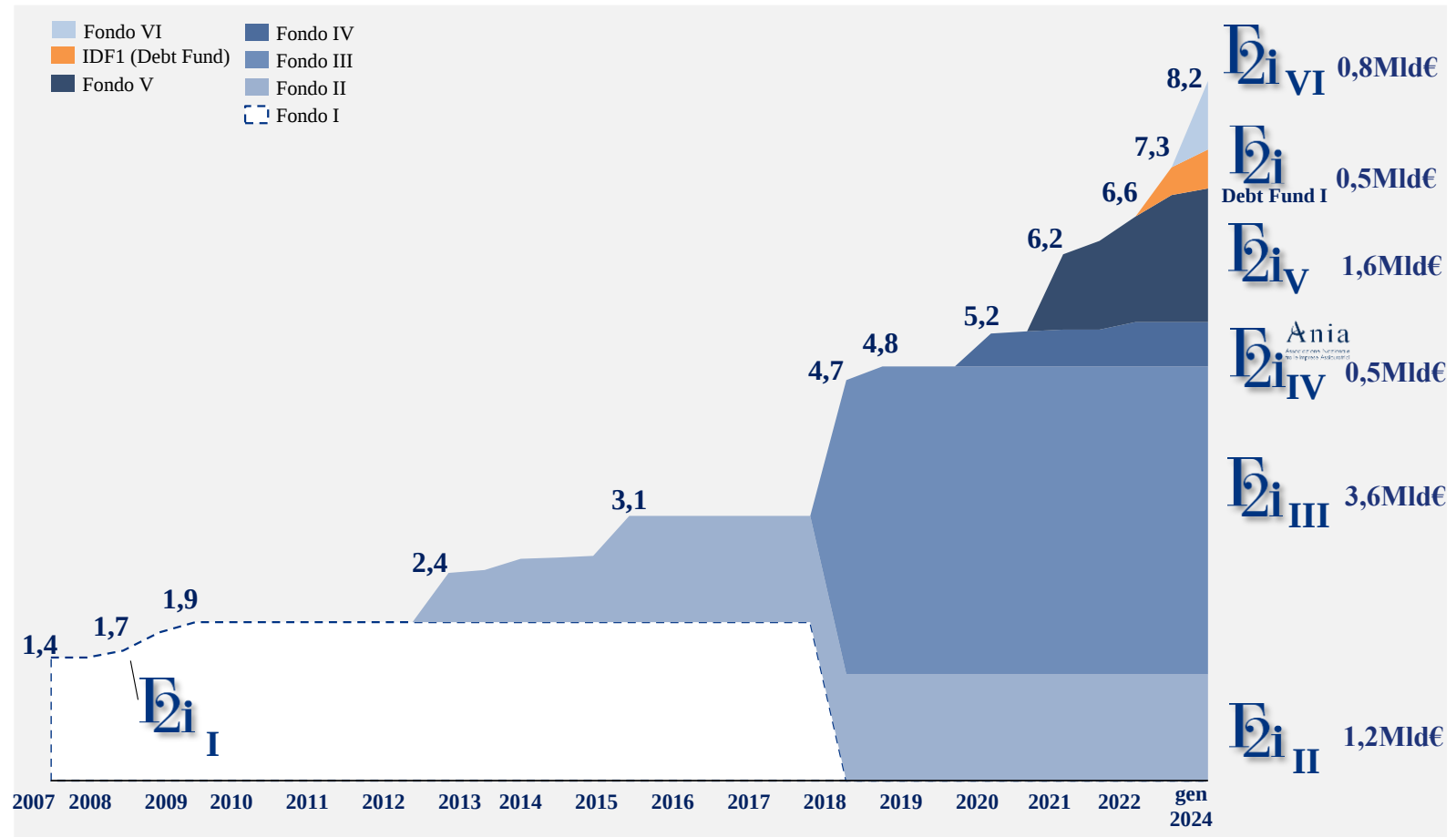
INVESTORS BREAKDOWN



Pension Funds + Insurance Companies + Bank Foundations + Sovereign Funds: 78%

MISSION:

...create value *turning financial resources into 'real economy' projects*....





ITAL GAS STORAGE



Farmacie Italiane



ALTHEA





NETWORK TECHNICAL DATA



PORTS
8 terminals managed in 4 ports

VOLUME OF GOODS HANDLED
over 9 million tons

COMPANIES
14 subsidiaries

EMPLOYEES
over 500

Vision

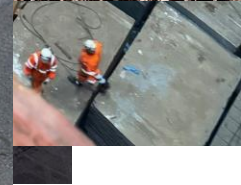
Realize an **integrated ecosystem** in the '*general cargo*' logistics that combines sustainability, safety, labor quality and welfare, flexibility and service excellence.

Overcome market fragmentation and increase the long-term efficiency of both the managed assets and clients value chain

360' sustainability



What we do



CARRARA • LIVORNO • MONFALCONE • VENEZIA

Why FHP?

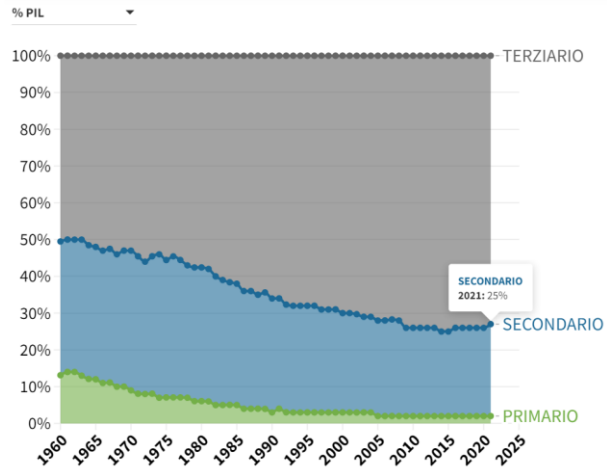
Solid bulk: a strategic element for Italian industries 'value chains'

- 80% of goods worldwide move by sea
- 70% of italian import moves by sea
- 50% of italian export moves by sea
- Bulk industry very fragmented

Autorità di Sistema Portuale	Tons (solid bulk)	Tons (containers)
Mar Ligure Occidentale	3.934.629	26.571.851
Mare Adriatico Orientale	3.746.840	8.754.808
Mare di Sardegna	5.593.222	304.964
A.P. di Gioia Tauro	386.598	41.453.584
Mar Tirreno Settentrionale	1.859.502	7.789.718
Mare di Sicilia Orientale	1.248.974	499.225
Mar Tirreno Centrale	1.756.025	10.872.236
Stretto di Messina	111.102	0
Mare Adriatico Centro Settentrionale	11.721.874	2.421.403
Mare Adriatico Settentrionale	7.722.342	5.282.763
Mare Adriatico Meridionale	6.936.094	724.243
Mar Ligure Orientale	1.705.478	12.242.351
Mar Tirreno Centro Settentrionale	3.766.384	907.375
Mar Ionio	7.944.220	283.847
Mare Adriatico Centrale	1.199.961	1.152.229
Mare di Sicilia Occidentale	1.438.337	284.796
TOTALE	61.071.582	119.545.393

69.8M tons
excluding
transhipment

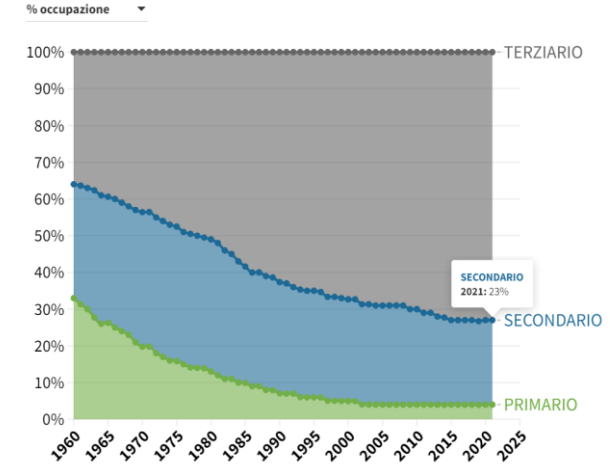
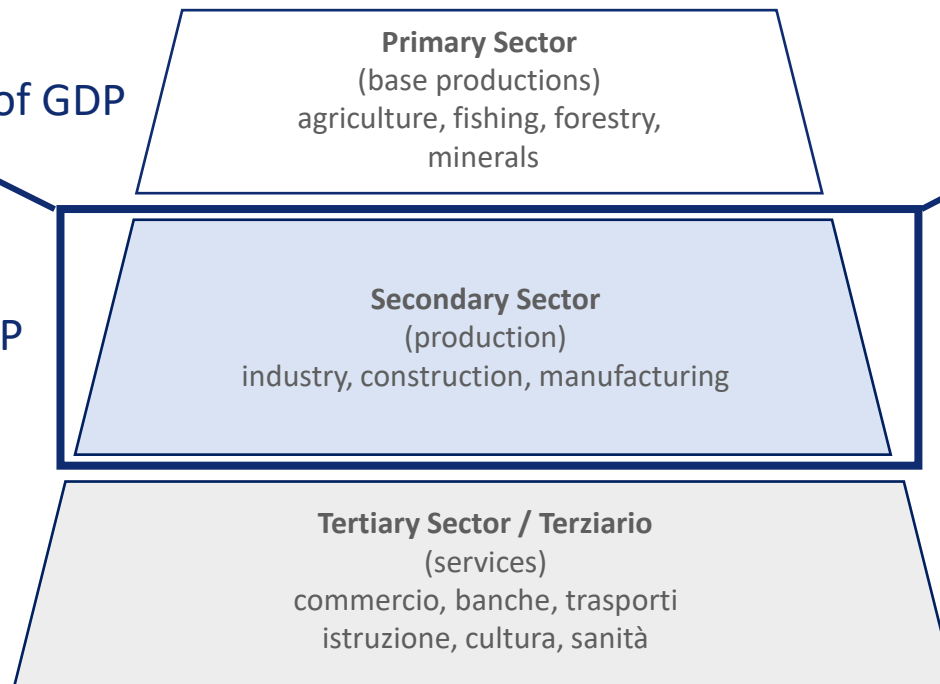
Solid bulk: a strategic element for Italian industries 'value chains'



2% of GDP

25% of GDP

73% of GDP

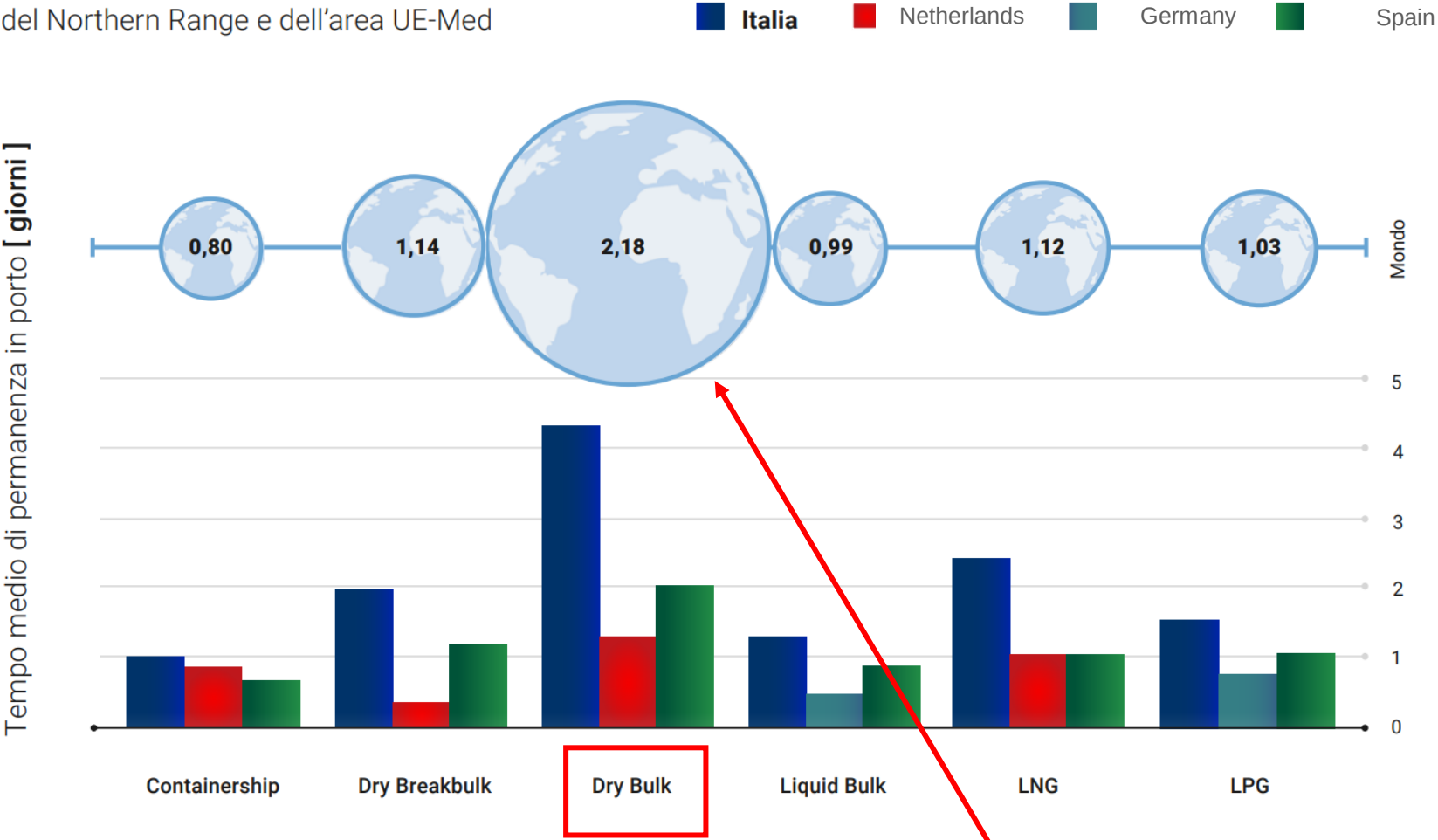


Top 10:

- Construction
- Machineries
- Steel Industry
- Foodstuff
- Automotive
- Chemical
- Clothing
- Electronics
- Furniture
- Paper

Need of efficiency

Confronto tra Italia e best performance competitor
del Northern Range e dell'area UE-Med



Source: **sr**m 

Need of infrastructures



Dry Bulk Ship Classes

Class	Size (dwt)	Draft (meters)	LOA (length)	Gear?	Commodity
Capesize	100,000-200,000	17m	unlimited	No	Iron ore, coal
Panamax	60-100,000	12-15m	275m	No	Most forms of dry bulk including sugar
Handymax (Supramax)	40-60,000	12-10m	150-200m	Yes	Most forms of dry bulk including sugar
Handysize	10,000-40,000	10m	130-175m	Yes	Most forms of dry bulk including sugar

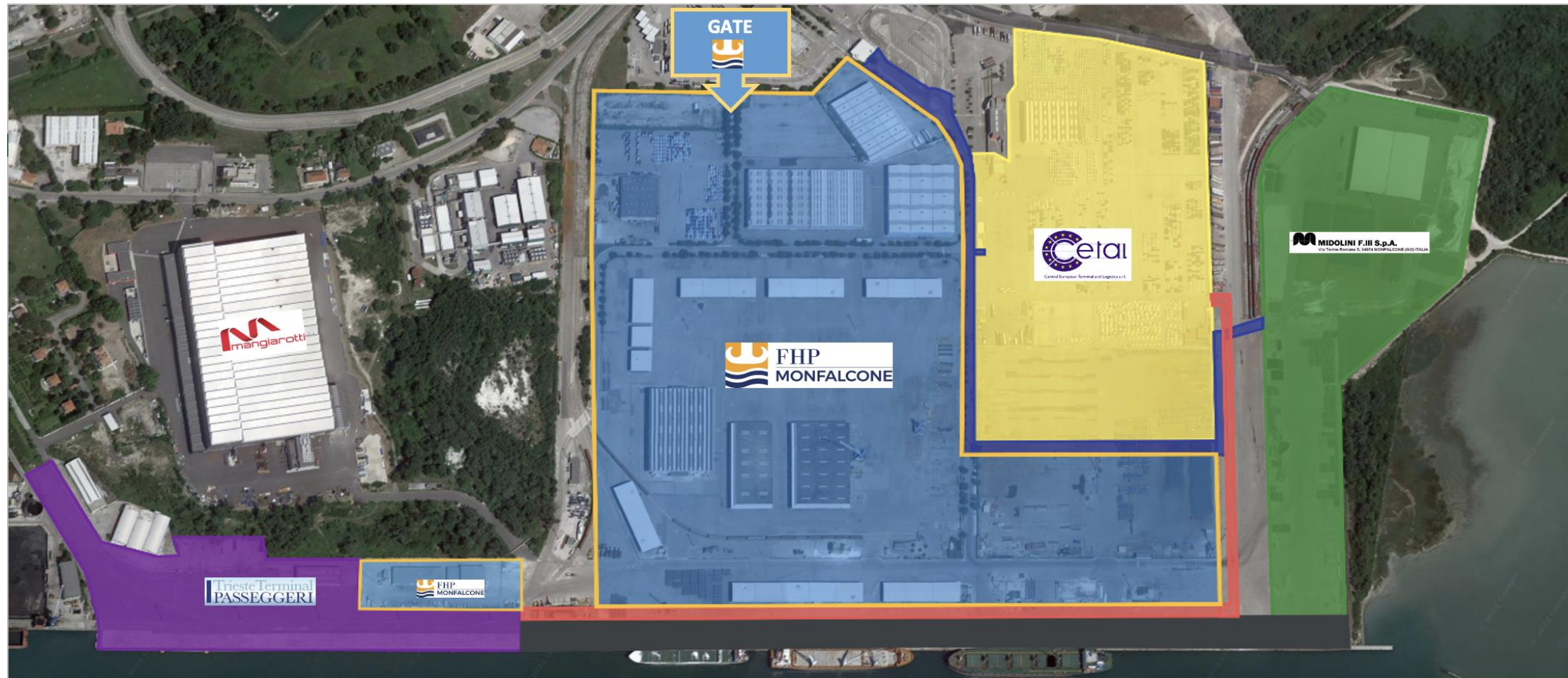
Need of efficiency

- **Quality**
- **Inland**
- **Digitization**
- **System Efficiency & Governance**



FHP Monfalcone







FHP MONFALCONE TECHNICAL DATA



m²
446.300
TOTAL
AREA



m²
79.000
WAREHOUSING
AREA



m
1.380
QUAY
LENGTH



tons/year
803.000
BY TRAIN
30%



km
2,9
RAILWAY
INFRASTRUC.

PORTS
2 terminals

VOLUME OF GOODS HANDLED
2.705.000 tons
(30% by train, 6% by barge)

COMPANIES
2 societies

EMPLOYEES
120

TRIESTE

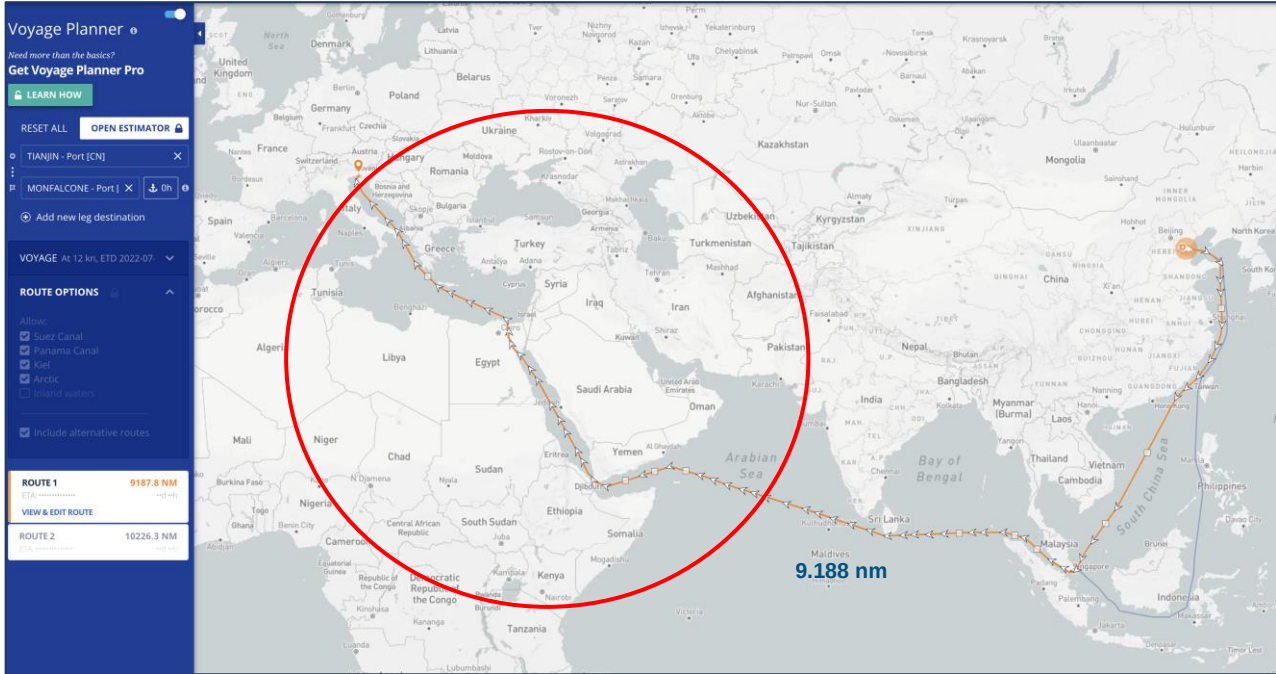
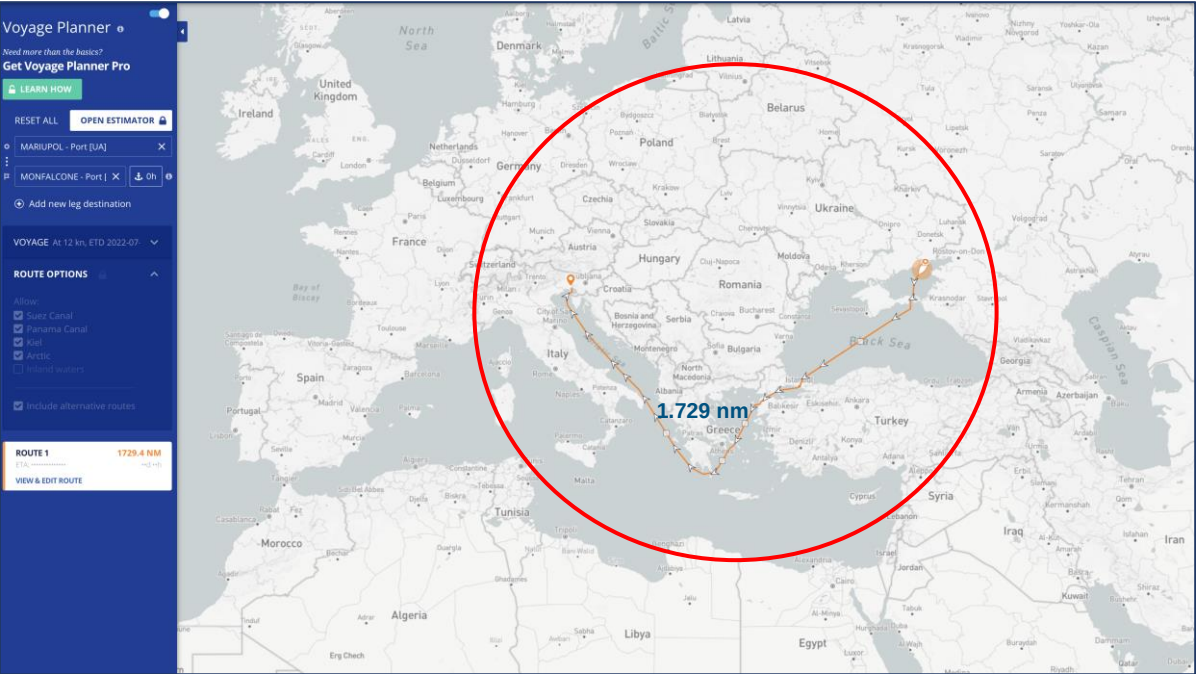
TIME PERIOD GOING FROM	01/01/2023 to 31/12/2023		
	IN	OUT	TOTAL
TOTAL THROUGHPUT (Ton.)	47.351.040	8.273.885	55.624.925
LIQUID BULK	37.345.812	0	37.345.812
Crude oil	36.337.378	0	36.337.378
Refined (petroleum) products	969.421	0	969.421
Gaseus, liquified or compressed petroleum products and natural gas	0	0	0
Chemical products	39.013	0	39.013
Other liquid bulk	0	0	0
DRY BULK	422.614	21.197	443.811
Cereals	66.669	0	66.669
Foodstuff/Fodder/Oil seeds	0	0	0
Coal and lignite	0	0	0
Ores/cement/lime/plasters	94.600	0	94.600
Metallurgical products	261.345	0	261.345
Chemical products	0	0	0
Other dry bulk	0	21.197	21.197
GENERAL CARGO	9.582.614	8.252.688	17.835.302
Containerized (including Ro-Ro containers)	4.606.431	3.803.740	8.410.171
Ro-Ro (excluding Ro-Ro containers)	4.239.074	4.084.890	8.323.964
Other general cargo	737.109	364.058	1.101.167

MONFALCONE

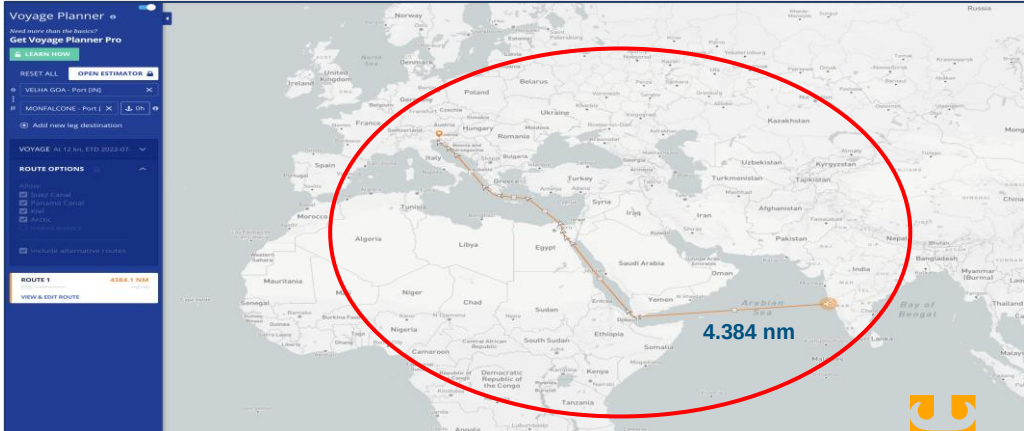
TIME PERIOD GOING FROM	01/01/2023 to 31/12/2023		
	IN	OUT	TOTAL
TOTAL THROUGHPUT (Ton.)	3.079.148	750.573	3.829.721
LIQUID BULK	0	0	0
Crude oil	0	0	0
Refined (petroleum) products	0	0	0
Gaseus, liquified or compressed petroleum products and natural gas	0	0	0
Chemical products	0	0	0
Other liquid bulk	0	0	0
DRY BULK	2.492.141	519.984	3.012.125
Cereals	18.078	22.000	40.078
Foodstuff/Fodder/Oil seeds	0	0	0
Coal and lignite	134.031	0	134.031
Ores/cement/lime/plasters	51.424	0	51.424
Metallurgical products	2.250.528	497.984	2.748.512
Chemical products	38.080	0	38.080
Other dry bulk	0	0	0
GENERAL CARGO	587.007	230.589	817.596
Containerized (including Ro-Ro containers)			
Ro-Ro (excluding Ro-Ro containers)	63.379	139.156	202.535
Other general cargo	523.628	91.433	615.061

**77% of ADSP
dry bulk volumes**

Current challenges



9%		BRASILE	60.800,19
41%		REPUBBLICA POPOLARE CINESE	285.828,28
5%		FEDERAZIONE RUSSA	31.637,45
10%		INDIA	70.309,20
21%		INDONESIA	143.350,72
4%		VIETNAM	30.075,94
6%		ARABIA SAUDITA	39.860,72
0%		OLANDA	1.039,80
4%		MALESIA	26.980,74
GRAND TOTAL			689.883,04



"Addressing Inimitable Challenges of Mediterranean and European Logistics to Increase Regional Cargo Volumes as Well as Supply Chain Movement"

- Fragmentation does not support **system efficiency**
- Constant **dialogue operators & institutions** to ensure adequate infrastructures **to retain and grow** volumes
- Focus on **end-2-end** (coordination beyond the Ports)
- Focus on **digitization**
- Focus on **sustainability**



FHP
HOLDING
PORTUALE



THANK YOU!

www.fhpgroup.it

**FHP LA FORZA
DELLA SQUADRA**