



ASPT - ASTRA F.V.G.

FREIGHT FORWARDING & LOGISTICS ASSOCIATION

PORT OF TRIESTE – FRIULI VENEZIA GIULIA

THE FREE PORT OF TRIESTE

Infrastructure & Logistic network



MAY 2019

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1. ASPT-ASTRA F.V.G.-ASSOCIATION OF FREIGHT FORWARDERS AND TERMINAL OPERATORS - PORT OF TRIESTE and FRIULI VENEZIA GIULIA

1.1 OUR HISTORY

Dating back to **1898** is the founding of a "*Consortium of Forwarding Agents interested in traffic between Trieste and Vienna*", that grouped together the most important Agents in Vienna, among which many are still active today in Austria and in Trieste. The association was indeed one of the first of its kind in Europe and the **first in the Mediterranean Basin**.

1906 were officially founded an Association of 26 Forwarding Agents with their HQ in Trieste, of which our Association today is the direct heir pursuing the same aspirations and objectives. We are, among others, **cofounders** of the **FIATA** (*Fédération Internationale des Associations de Transitaires et Assimiliés*).

1.2 YOUR REGIONAL CONTACT IN FREIGHT FORWARDING AND LOGISTICS

Our Association represents the **CONFETRA** (Italian national Association of transport and logistic operators) and the **FEDESPEDI** (Italian Association of the International Forwarding Agencies) for the whole **Region Friuli-Venezia Giulia**.

The main task of our Association is to represent and support the interests of the forwarders and logistic operators of our Region on local, national and international level in front of the public opinion, the public institutions, political interlocutors etc.

As we pay our highest attention to the **professional training** and technical skills we support our members in **organising and financing** their **training activities**. We also issue a **daily newsletter** providing fresh information in many fields that influence the work of our international operating Associates (e.g. new legislation, international markets situation, political evolution, best practices etc.).

Our staff supports our Associates to implement their business opportunities through the organisation of **marketing initiatives** such as participation on trade fairs and exhibitions, including a free of charge **linguistic assistance** for translations and business visits.

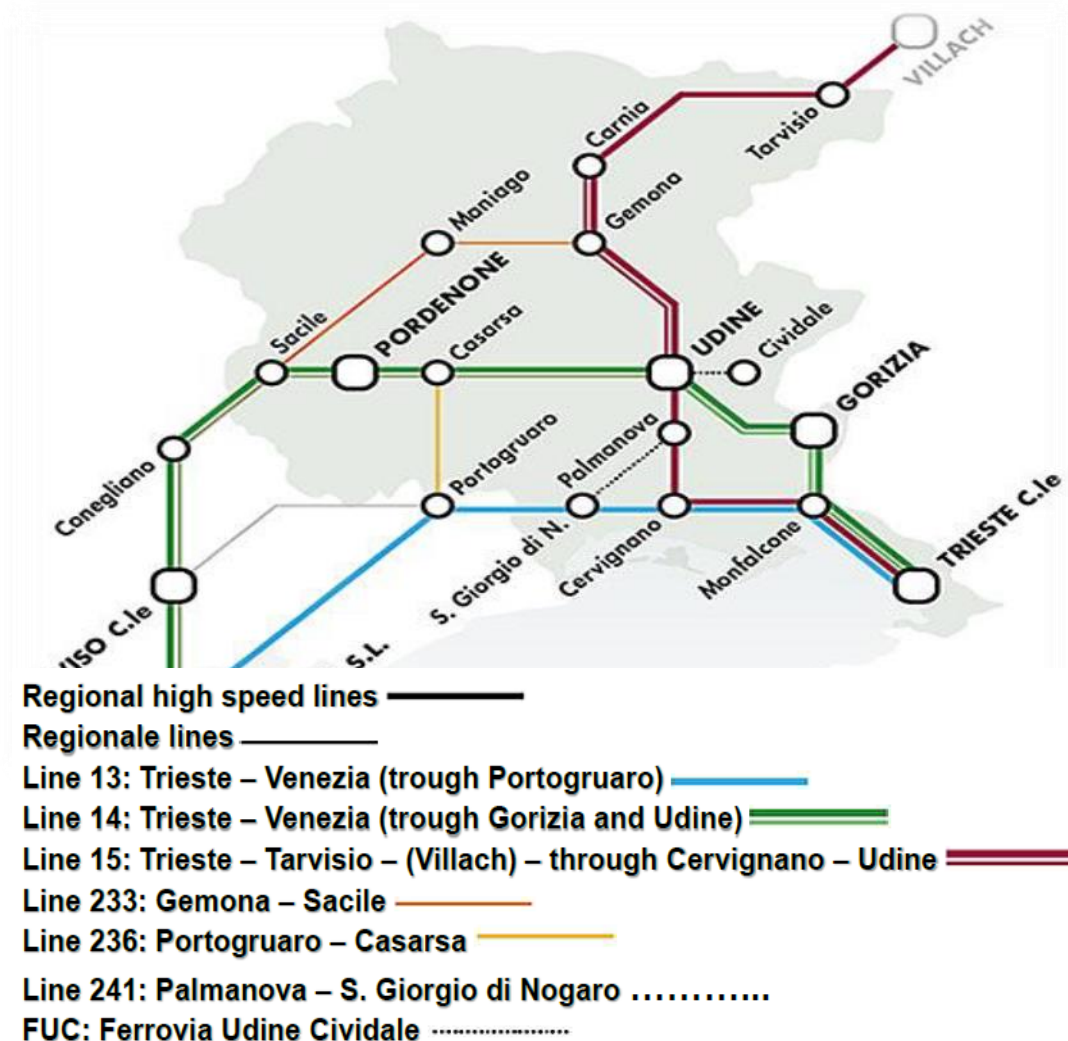
Regularly meet in our HQ the board of administrators and our members, the regional **Association of the Port Terminal Operators** (ANTEP FVG) and the **Customs Committee** composed of experts in tax issues and forwarding entrepreneurs.

That way we always have an actual view on the open issues regarding the daily efforts of our members and the evolution of the logistic sector in the Region Friuli-Venezia Giulia, Italy.

2. RAILWAY INFRASTRUCTURE OF THE REGION FRIULI – VENEZIA GIULIA

2.1 Main features of our railway System

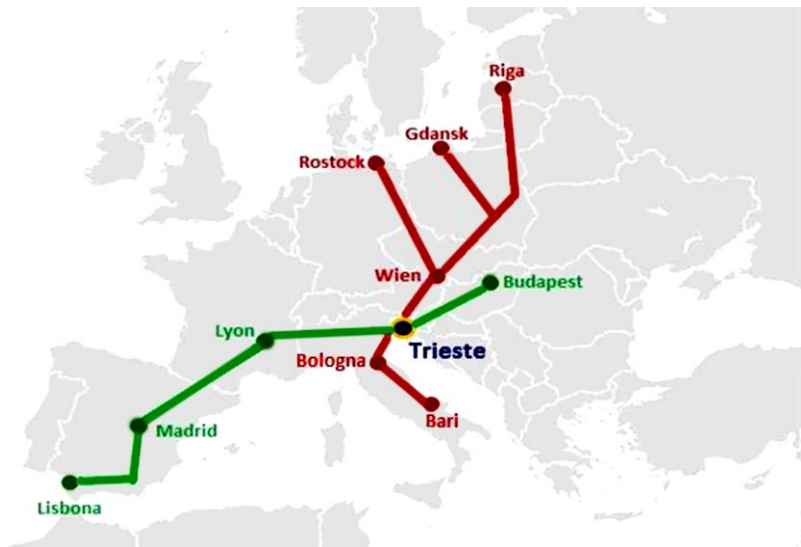
The most important railway line connecting the free Port of Trieste with the north and east European Markets is the so-called „**Pontebbana**“ (Udine – Tarvisio). The line has a capacity of **220 Trains/24 hours** and is already suitable for the **high speed** and **high capacity** trains without any further investment. Another important asset is the **Advanced Managing System - SCC** based in Venezia Mestre, which is able to control the railway traffic of both Italian regions Veneto and Friuli-Venezia Giulia. The System is flexible and was developed to suite to the constant improvement of the railway network (e.g. remote controlled train stations, implementation of the rails, different mechanical and electronic train technologies - incl. remote train control etc.). All this features make our railway system **one of the most evolved European infrastructures for the rail freight transport**.



3. THE PORT OF TRIESTE and ITS LOGISTIC NETWORK– OUR FACTORY

3.1 Position

Key position on the crossroad of the **TEN-T** strategic **axes** of the **Baltic-Adriatic** and **Mediterranean corridors**, natural **deep water** up to **18 m**, great ease of access for shipping, excellent road and rail links and proximity to central and eastern EU markets, make the Port of Trieste an efficient and competitive destination.



Trieste plays a decisive role in two separate supply chains: long-distance **intercontinental maritime transportation** and short/medium-distance **intra-Mediterranean trade**. The Port of Trieste offers a **saving of almost five days sailing** on routes between Europe and East Asia, compared with North European ports. For a fleet of 6,000 TEU container vessels this translates into a saving of over USD 25 million a year in freight and fuel costs.



SUEZ-NORTHERN EUROPE

- distance: **3527 miles**
- navigation: **7 days, 8 hrs**

SUEZ-TRIESTE

- distance: **1294 miles**
- navigation: **2 days, 16 hrs**

GAIN

- ✓ distance: **2233 miles**
- ✓ navigation: **4 days, 16 hrs**

But save about 5 days of transit time from Suez Canal to the port is nothing when you lose much more days to deliver the goods to the final destination. This is not a problem for the port of Trieste, which is located at the **most northern spot in the Mediterranean Sea**. Many destinations in central Europe are in the range of 600 kms and can be quickly and efficiently reached by road from Trieste:

| City | Distance in Km | City | Distance in Km |
|---|----------------|---|----------------|
|  Milano | 411 |  Graz | 288 |
|  Padova | 183 |  Munich | 480 |
|  Bologna | 290 |  Ulm | 569 |
|  Villach | 191 |  Budapest | 539 |
|  Wien | 472 |  Bratislava | 535 |
|  Salzburg | 359 |  Prague | 865 |
|  Linz | 497 |  Zagreb | 222 |



3.2 Rail connections

Trucking service is surely the quickest and easy way to deliver the goods to or from the port, but neither the cheapest, nor the most environmental sustainable way. Rail connections are the ideal way to connect one port to its markets and Trieste has always been a rail port. To serve the target markets in **Central and Eastern Europe**, highly specialised intermodal services with **direct trains** organised e.g. by the company **Alpe Adria S.p.A.** (<http://www.alpeadria.com>) - a multi-client operator, which offers all-inclusive packages with guaranteed delivery and frequency - have been developed to connect Trieste with manufacturing and industrial areas of many European countries, **e.g. Germany, Austria, Czech Republic, Slovakia, Hungary, Luxembourg, Belgium etc..**

Please note, that many private rail operators offer rail freight transport services from and to the Free Port of Trieste.

The listed train connections may vary due to the market demand.

|  AUSTRIA | Terminal | R.T./week | Transit time |
|---|-----------------|------------------|---------------------|
| Villach – links to: | TMT | 7 | A-B (3h 30') |
| Salzburg | | Daily | A-B |
| Wien | | Daily | A-B |
| Linz | | Daily | A-B |
| Wolfurt | | Daily | A-C |
| Graz | | 2 | A-B (10 h) |
| Wels | SAMER/DFDS | 10 | A-B (10h) |
| Salzburg (Ferneti - Interporto Trieste) RO-LA | | 3 | A-A (8h 30') |
|  BELGIUM | | | |
| Genk | SAMER/DFDS | 3 | A-B (25h) |
|  LUXEMBOURG | | | |
| Bettembourg | SAMER/DFDS | 9 | A-B (25h) |
|  CZECH REPUBLIC | | | |
| Paskov | TMT | 3 | A-B (24h) |
| Ostrava | EMT | 4 | A-B (24h) |
|  SLOVAKIA | | | |
| Dunajska Streda | TMT | 4 | A-C (36h) |
|  GERMANY | | | |
| München Riem | TMT | 6 | A-B (11h) |
| Burghausen | | 2 | A-B (16h) |
| Giengen (Brenz) | | 2 | A-B (12) |
| Karlsruhe | | 4 | A-B (20h) |

| | | | |
|--|-------------------|---------------------|-----------|
| Köln | EMT | 9 | A-B (22h) |
| Ludwigshafen | | 4 | A-B (11h) |
| Munchen Riem | SAMER/DFDS | 5 | A-B (15h) |
| Duisburg (Krefeld) | | 4 | A-B (24h) |
| Ludwigshafen | | 2 | A-B (18h) |
|  ITALY | | | |
| Novara/Brescia | TMT/DFDS SAMER | 6 | A-B (8H) |
| Bologna Interporto | | On spot basis (A-A) | |
| Rubiera | | On spot basis (A-A) | |
|  HUNGARY | | | |
| Budapest | TMT | 12 | A-B (24h) |

Further train connections with locations in Italy and Europe can be provided on demand.

4 Layout of the Port

The port of Trieste includes five free zones, three of them destined to commercial activities (Old Free Zone, New Free Zone, Timber Terminal Free Zone) and two used for industrial activities (Mineral Oils Free Zone, Industrial Free Zone).



4.1 Main Terminals for commercial activities:

NEW FREE ZONE, Pier VII - TRIESTE MARINE TERMINAL SPA

<http://www.trieste-marine-terminal.com/en>

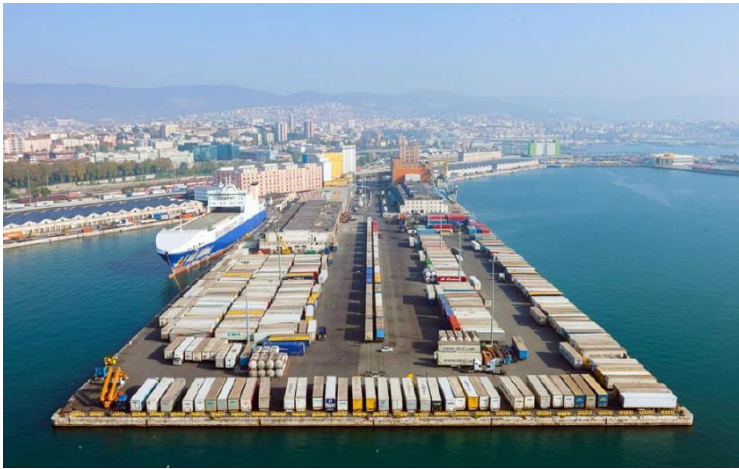


The TMT's container terminal has the **deepest natural draft of the whole Mediterranean Sea (18 meters)** at the berth), allowing all kinds of containerships to quickly and easily berth. The **5 rail tracks of 600 meters each** are served with 3 dedicated rail mounted stacking cranes. This modern infrastructure

allows to manage **over 11.500 trains per year**. More than **900,000 teu capacity** which guarantees no congestion or bottlenecks. A further extension **plan already approved (1.2 million teu)**. The wide range on intermodal services offers efficient and fast connections to destinations in central and east Europe and northern Italy.

NEW FREE ZONE, PIER VI - EUROPA MULTIPURPOSE TERMINAL

<https://www.emterminals.com/>



The Europa Multipurpose Terminal has an extension of **80.000 m²** and offers 1500 m of berths incl. landing place for Ro.Ro. ships. The terminal dispose on **4 rails** and **9000 m² of warehouses**.

NEW FREE ZONE, PIER V – SAMER/DFDS TERMINAL

<http://www.samerseaports.com/>



The Samer Terminal has **100.000 m²** and **900 m of berths** incl. 3 landig places for Ro.Ro. ships and one rail track. Among the others, SAMER is a specialist in the field of the so known **ISU transport**.

FREE PORT OF TRIESTE - GCT TIMBER TERMINAL

<http://www.gcterminal.it/>



ventilated warehouses as well as **30.000**

The General Cargo Terminal (148.000 m²) is focused on the traffic of wooden products and non-ferrous metals. The infrastructure disposes of one 350m long berth. The terminal has one rail track and is also provided with machinery for the **anti-stain treatment** of wooden products. At the terminal are at disposal **m²** of covered surfaces.

4.2 Port Railway System

The Port of Trieste has an **internal rail network (70 km of tracks)** connected to the national and international network and ensures all the docks are served by rail with the possibility of shunting and/or assembling freight trains directly in the various terminals;



View of the train station Campo Marzio

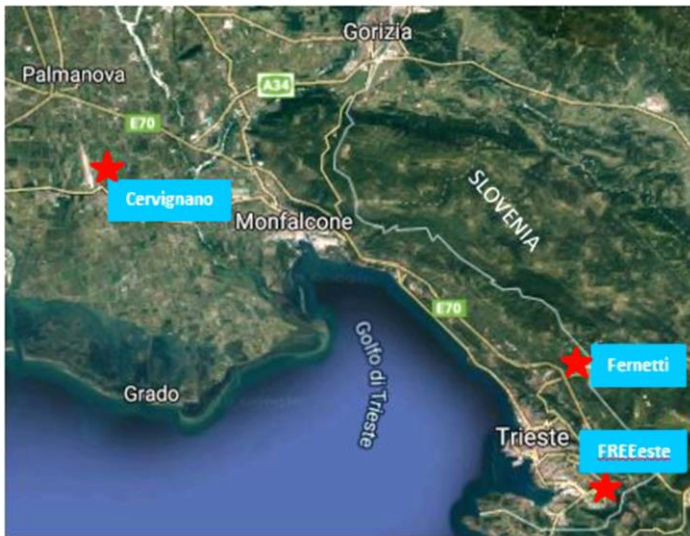
Further implementation:

Signed agreement concerning a common investment of the Port Authority and the Italian Railways (RFI) – **70 mln. €** for the upgrade of the train station in Campo Marzio.

- **complete automation of the marshalling area**
- **6 tracks for 750 m long trains**
- **independent access of the trains from the terminals**



INTERPORTO TRIESTE S.P.A. - inland terminal



Interporto di Trieste S.p.A. is a company active in **intermodal logistics** and located in a strategic position to connect the goods traffic among the Central Eastern European markets and the Mediterranean basin. It offers logistics services as dry port of the Port of Trieste. **In 2017 Interporto acquired FREEeste**, an area of a total of 240,000 sqm including three warehouses, bundle of tracks and an operating area. **Since 2018 Interporto is also owner of Interporto di Cervignano del Friuli S.p.A.** and the total area available increased to 932,000 sqm.

FERNETTI AREA:

Road – Railway – Ship

The multimodal terminal in Ferneti is situated **18 km from the Port of Trieste** adjacent to the Italian-Slovenian border. The Terminal is a **Hub** for the freight transport between the north and east European markets and the Mediterranean area. Thanks to the strategical position, the **6 rail tracks**, the **parking area** and his **storage facilities** the terminal has a key-role in supporting the port terminals by managing the freight transport operations.



Highway connections

- A4 Trieste-Torino
- A23 Palmanova - Tarvisio
- E61 Lubljana



Rail services

- 6 railway tracks
- RoLa Salzburg
- General Cargo trains
- Intermodal service



Infrastructure

- Infrastructured area: 160,000
- Covered warehouses: 33,000
- Trucks parking area: 80,000

FREEeste AREA:



Storage activity

- 72,000 sqm warehouses dedicated to logistics activities and the possibility of building up new infrastructures up to 65,000 sqm
- Processing and storage in the International Free Trade Zone
- 2,000 sqm cold storage facility (work in progress – in service within 2019)

100,000 sqm area with railway connection

(work in progress – available within 2019):

- Empty container depot
- Intermodal services

Industrial activities in International Free Trade Zone of Trieste

- Handling and storage of goods in customs-free trade zone areas

Work in progress – completed within 2019



CERVIGNANO AREA:



Interporto di Cervignano SpA

Total area: 460,000 sqm

Operating areas: 160,000 sqm

Vehicle parking areas: 67,000 sqm

Railway (n. tracks*m): 6*750 + 2*450

Warehouses: 24,000 sqm

Cold storage: 600 sqm

6. SDAG - GORIZIA INTERPORTO - inland terminal



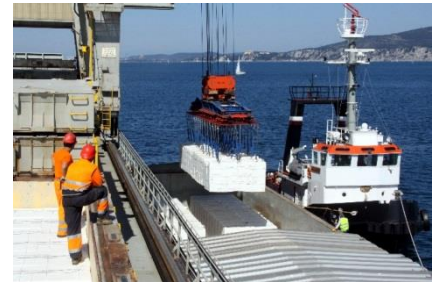
| INTERMODAL TERMINAL | FOOD LOGISTICS | TRUCK PARKING AREA |
|---|--|---|
| <ul style="list-style-type: none"> ❖ Total area: 20,000sqm ❖ 3,000-sqm intermodal warehouse connected to and crossed by a road lane and a railway track, equipped with a bridge crane having a capacity of 25 tons ❖ 5 railway tracks ❖ ROLA system ❖ Video-surveillance ❖ Open access-control paved fenced lit areas ❖ Specialized operators | <p>Warehouses for dry, fresh and frozen goods managed with flexible temperature (up to -30°):</p> <ul style="list-style-type: none"> ❖ 11 refrigeration rooms for a total of 4.400sqm and a total volume of 28.700mc ❖ 2 areas before the refrigeration rooms at controlled temperature to preserve the cold chain ❖ authorization to store biological packed food ❖ authorization to store alcoholic goods for national commercialization, liable to the excise duty | <ul style="list-style-type: none"> ❖ 550 parking lots for trucks ❖ video surveillance 24/7 ❖ services that make more comfortable the long and quick stops of truck drivers: <ul style="list-style-type: none"> ✓ Cafè and Snack Bar ✓ Minimarket ✓ Toilettes and showers ✓ Free WIFI ✓ Info Point (e.g phone charge cards) ✓ Equipped open spaces |

7. - COMPAGNIA PORTUALE (CPM)- MONFALCONE PORT

Compagnia Portuale is the largest private port operator in the Port of Monfalcone, providing comprehensive end to end stevedoring, transport and logistics services to its clients: currently **handling over 3 million tonnes of cargo annually**.

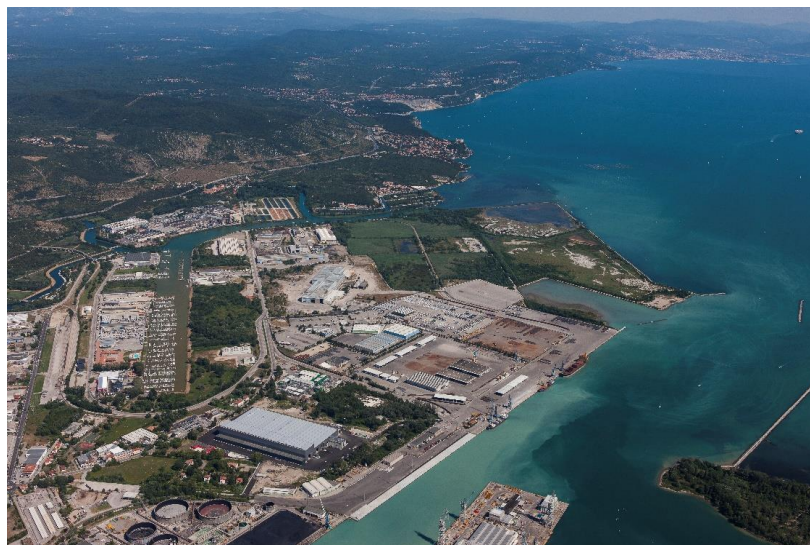


CPM operates in an area of approximately 680,000 sqm and has a **dedicated area of almost 300,000 sqm**. The Port of Monfalcone is connected to the railway line and is approximately 1km from the motorway entrance. The wharf length is about 1,900 m with a **draft of about -11.00m**.



CPM handles all types of **breakbulk cargo** including **steel, pig iron, aluminium, woodpulp, heavy lift, woodchips, project cargo, yachts, ro-ro** just to name a few. No request is too big or too small.

- ❖ **Intermodal Inland Terminal** just outside the port boundaries which covers an operational area of approximately **40,000 sqm with 10 rail tracks** directly connected with the main national and international railway systems.
- ❖ CPM also offers a **further 35,000 sqm of operating areas** directly opposite the port gate.



8. THE SPECIAL FREE PORT REGIME

The Free Port of Trieste was **established** by the Austrian Emperor Carlo VI **in 1719** and strongly developed by his daughter Maria Teresa who considered Trieste as the only Port of the Austrian Empire.

The **1947 Paris Peace Treaty** and the **Memorandum of London in 1954** maintained the Free Port of Trieste's **legal status**, thus giving it an **unique customs regime**. Since that time, international and domestic customers can benefit from special customs conditions for import, export and transit operations.

The legal rules of free zones around the world are characterised by a lack of international uniformity in the legal framework. There are no international conventions and treaties – except for Annex VIII to the 1947 Paris Peace Treaty regarding the Free Port of Trieste.

The free Port of Trieste **is not comparable to an EU Free Zone**. The Free Port of Trieste is the only real free port in the European Union as **its regime is confirmed by the international law** (Paris Peace Treaty -1947) **signed before the creation of the EU**. For this reason many of **the benefits of the Trieste's free Port are not available in the EU Free zones** especially because of the EU Rules concerning state aid that severely restrict the creation of special economic zones and their regime.

8.1 COMPETITIVE ADVANTAGES OF THE FREE PORT REGIME

❖ Free access granted to ships, trains and trucks of all the flags and Countries

As consequence of the special free port regime, ships, trains or trucks of every nationality and flag can enter the free port areas of the Port of Trieste, without any exception.

This means e.g. that trains operated by any rail carrier can enter the port without any limitation and under an independent, competitive and efficient shunting organization. Furthermore, the trucks coming from foreign Countries have unlimited access to the free port areas; e.g. trucks arriving from third Countries which are unloaded from ships in the free port can proceed to the first Italian border with Austria or Slovenia, as well as the trucks arriving via land for the ship-boarding in the free port destined to a third Country are not required to get a bilateral road permission issued from the Italian Government. In both cases, a temporary transit permission is issued directly by the Port Authority of Trieste, acting as guarantor and administrator of the unique Free Port regime.

Goods in transit from non-EU country to non-EU countries or without a destination at time of discharge

A first and immediate benefit comes from the fact that **foreign goods can be kept in the free port as foreign goods:**

- for an unlimited time
- without the payment of customs or inland duties until the date of the eventual import
- without the necessity to guarantee Customs for an amount equal to the duty and the VAT for the import

Unlike any other free zone in **our customs warehouses:**

- it is not necessary to introduce to Customs any declaration as far as the goods remains inside the free port
- there is no need to issue documents of transit for the transfer from the port to the Customs warehouse

This regime is particularly interesting for the goods coming from a non EU country and are addressed to another non EU country. It represents an advantage also for those goods coming from a non EU country on consignment, that means that are not sold yet, but can later be sold both to a non EU and an EU buyer.

❖ Goods destined to be imported in the European Union

For goods imported into the EU through the Free Port **customs duties and VAT** payments can be **postponed up to 6 months**. The interest rate applicable is very low: **50% of the 6 months Euribor rate** ¹. This advantage can be used also from the European importers (not Italian), who want to import goods near to Trieste's port rather than using the customs of their own Country. The forwarders of Trieste's port are at disposal of EU – companies interested to organise such kind of import operations.

¹ If due to the market conditions the Euribor rate is negative or Ø, the interest rate amounts to 0,1 %.

❖ Processing of goods in the free port areas

Another benefit offered by the free port regime consists in the tax system for operations on the goods in the free port area.

- **Manipulations of goods which do not change their customs classification** (e.g. selection, sampling, labelling, drying and qualitative improvement in general), can be done on the goods deposited in the Free Port without paying any duty or VAT on their value
- The **manipulations which modify the customs classification of the goods** can be done on the goods deposited in the Free Port only **if authorized by the Port Authority, in accordance with the Customs Authority**. If the product obtained will be imported, duties and import VAT will be paid according to the new customs classification. If the goods will be delivered in a non EU country, no taxes for the value added to the goods will be paid.
- Moreover, for these operations it is possible to use electric power and other power fonts at reduced cost, thanks to the possibility of reduction of excise duties (case by case evaluation needed).
- In case that manipulations comply with the international trade rules regarding the preferential origin, it is possible to obtain the **European preferential origin** or to use the **"Made in Italy"** trademark **under the authorization of the customs authority**.



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