

# OUR VALUE CHAIN CLUSTERS

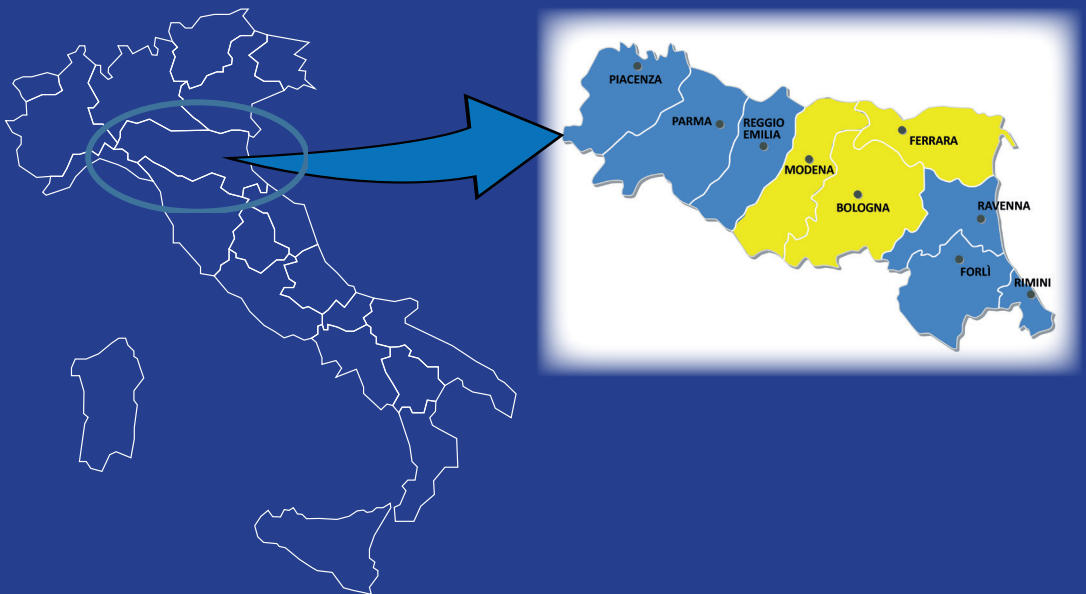


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# WHAT IS CONFINDUSTRIA EMILIA ?

Confindustria Emilia is an Italian Association of more than 3.200 industrial companies in the yellow area: (Province of Bologna, Modena and Ferrara)



# FACTS & FEATURES ABOUT US:



## **Main sectors of the members' activities:**

Mechanics, Packaging, Automotive, Food&Beverage, IT, Industrial Services, Transport, Tourism & Culture



**109 Bln €** Total turnover generated by all the member companies (96% from EU companies)



**64 Bln €** Total turnover generated by the export of all the member companies



**69%** of members are Manufacturers  
*1<sup>st</sup> in Italy for manufacturing companies on the total members*



**90 %** of the members are owned by EU companies

# OUR ORGANIZATION IN VALUE CHAIN CLUSTERS

Our members are grouped in 20 **value chain clusters** to enhance collaboration and accelerate growth.

- **AGRIFOOD**
- **AUTOMOTIVE**
- **CHEMICAL & PHARMACEUTICAL**
- **CONSTRUCTION**
- **DIGITAL**
- **ELECTRONICS & MECHATRONICS**
- **ENERGY**
- **FACILITIES**
- **FASHION & LUXURY**
- **HEALTH**
- **HOME**
- **INDUSTRIAL VEHICLES**
- **MACHINE TOOLS**
- **METALS & COMPOSITE MATERIALS**
- **MOBILITY & LOGISTIC**
- **PACKAGING**
- **PAPER & PRINTING**
- **PLASTIC**
- **PROFESSIONAL SERVICES**
- **TOURISM & CULTURE**

Please find on the following pages on the left part the Cluster data and on the right each Cluster President presenting its own Company.

Deep dive  
in our value chain clusters..



# «AGRIFOOD»

Regional Fact&Features

President



**Giuseppe Villani**

Villani Spa



Value  
Chain  
Cluster

*by kind  
of activities*

Total	~ 2,400	~ 69,500	25,4 Bln €
Products	16%	21%	27%
Distributors	34%	28%	53%
Raw Materials	9%	4%	4%
Support work	12%	14%	10%
Services	29%	33%	6%



**EXPORT**



Exporting Companies

23%

Turnover exported

12%





## **A STORY SET IN EMILIA THAT STRETCHES BACK TO 1886**

In 2019, Villani Salumi turns 133. This historical achievement means the company is the oldest charcuterie maker in Italy's Emilia-Romagna region and among the longest established in Italy. Villani is a family-run company that produces special, top-quality cured meats, with all the passion of artisans and all the guarantees of a modern industry.

With five generations of family and lifetime spanning three centuries of Italian charcuterie history, today Villani is one of the nation's leading names in its sector. A position and a production scale that have been achieved without ever betraying the artisan spirit of its origins and its strong ties with the local area.

Villani S.p.A. was established in 1886 in Castelnuovo Rangone, in the province of Modena, which is now one of Europe's most important food districts. Today the company has seven production sites: in Castelnuovo Rangone it produces salami, cooked hams and specialties from the Emilia area; in Bentivoglio (Bologna) mortadella; in Castelfranco Emilia (Modena) coppa and pancetta; in San Daniele del Friuli (Udine) San Daniele ham PDO; in Langhirano (Parma) Parma ham PDO and other dry-cured products.



# «AUTOMOTIVE»

Regional Fact&Features

President



**Stefano Domenicali**  
Automobili Lamborghini Spa



Value  
Chain  
Cluster  
*by kind  
of activities*

**Total**

~ 820

~ 19,000

13 Bln €

Products

16%

23%

10%

Subcontractors

37%

18%

7%

Distributors

47%

59%

83%



**EXPORT**



Exporting Companies

34%

Turnover exported

49%



Founded in 1963, Automobili Lamborghini is headquartered in Sant'Agata Bolognese, in Northern Italy.

With 157 dealerships today throughout the world, in half a century Automobili Lamborghini has created a continuous series of dream cars, including the 350 GT, Miura, Espada, Countach, Diablo, Murciélago, as well as limited editions including the Reventón, Sesto Elemento, Veneno and the Centenario.

In 2018 Automobili Lamborghini launched its third model the Lamborghini Urus, the first Super Sport Utility Vehicle. This car creates a new niche in the luxury segment with benchmarking power, performance and driving dynamics, unparalleled design, luxury and daily usability.

The V10 Huracán family, successor to the iconic Gallardo, made its world debut in 2014. It's now in production with the Huracán EVO version, featuring a next generation V10 engine and incorporating next-generation vehicle dynamic control and aerodynamics.

The Aventador S Coupé and Roadster presented in 2017 represent a new benchmark in the world of V12 luxury super sports cars. And the Aventador SVJ (2018), has already claimed its position as the Nürburgring-Nordschleife production car record holder.

In Fiscal Year 2018, Automobili Lamborghini achieved a new all-time high in all key business figures.

After crossing the one billion threshold for the first time in 2017, turnover grew by 40% from 1,009 mio. Euro to 1,415 mio. Euro in 2018. Deliveries to customers increased by 51% to 5,750 units with sales records in all major regions: EMEA, America and Asia Pacific. Thanks to new hirings, the total number of staff rose to more than 1,750 employees at the end of 2018: +10% compared to 2017, and +70% from five years ago.

According to a strategic investment programme, aligned with the launch of its new Super SUV the Urus, Lamborghini sees its production site doubled from 80.000 to 160.000 mq with the creation of substantial new facilities and technologies at its factory headquarters in Sant' Agata Bolognese, Italy.



# «CHEMICAL & PHARMACEUTICAL»

Regional Fact&Features

President



**Claudio Mingozzi**

Basell Poliolefine Italia Srl  
(LyondellBasell Group)



Value  
Chain  
Cluster  
*by kind  
of activities*

		~ 400	~ 6,000	~ 2,4 Bln €
Total				
Distributors		73%	57%	58%
Products		27%	43%	42%



EXPORT



Exporting Companies

43%

Turnover exported

25%

# lyondellbasell

*Advancing Possible*

LyondellBasell is a strong, global company delivering outstanding performance. One of the world's largest plastics, chemical and refining companies producing products and materials key to advancing solutions to modern challenges.

We manufacture and have joint ventures in 24 countries.

Our products are sold in more than 100 countries.

## 2017 SNAPSHOT

### Financial highlights

**\$ 12.28**

Diluted EPS from  
continuing operations (1)

**\$ 4.9 B**

Income for continuing  
operations (1)

**\$ 7.1 B**

EBITDA

**\$ 5.2 B**

Diluted EPS from  
continuing operations

### EBITDA by Segment

O&P Americas  
\$ 3.0 Billion

O&P Europe, Asia and  
International \$2.3 Billion

Intermediates & Derivatives  
\$ 1.5 Billion

Refining  
\$ 157 Million

Technology  
\$ 223 Million

### Key accomplishments

**23**

sites set production  
records in 2017

Our global fleet of  
crackers produced

**13% more**  
ethylene in 2017

Refining volumes  
increased by

**35,000**  
barrels/day

Our employees had

**fewer injuries**  
than any prior year in  
company history

1) Income from continuing operations of \$ 4,895 Million and diluted EPS from continuing operations of \$ 12.28 per share reflect a fourth quarter one-time, non-cash benefit of \$ 819 Million (\$ 2.05 per share) from the reduction of net referred tax liabilities due to U.S. tax reform.



# «CONSTRUCTION»

Regional Fact&Features

President



**Giuliano Montagnini**

S.A.P.A.B.A. Spa



**Total**

~ 3,500

~ 39,000

~ 8,3 Bln €

Value  
Chain  
Cluster

*by kind  
of activities*

Raw Materials

9%

8%

13%

Building  
& Renovation

36%

32%

48%

Real Estates

44%

46%

24%

Services

5%

5%

4%

Engineering  
& Machinery

6%

9%

11%



**EXPORT**



Exporting Companies

7%

Turnover exported

6%

# S.A.P.A.B.A.

Founded in **1929**, S.A.P.A.B.A. operates in the field of gravel extraction and processing, as well as in the production of cement and bitumen conglomerates. Over time, it developed a building division alongside its core business which was initially centred on urbanisation and road works, later expanding to include the construction of industrial, commercial and residential buildings and maintenance services.

The **cement production plant** has pre-blenders and automated control systems, according to the regulations in force, and is able to produce special high performance, quality cement, which is structured, durable, self-compacting, insulating, lightweight and pigmented.

The **bitumen conglomerate plant** produces both traditional bitumen conglomerates and those capable of sound absorption, suitable for fibre-reinforced draining flooring, rough-finished flooring and conglomerates using recycled materials, according to regulations in force.

Over the years the company has carried out **construction** projects in the following categories:

- ✓ Manufacturing - Logistics Buildings
- ✓ Commercial Building
- ✓ Healthcare Buildings
- ✓ Infrastructure
- ✓ Conservation – Restoration
- ✓ Road Maintenance
- ✓ Office Building
- ✓ Hotel and Reception Building
- ✓ Housing and Civil Construction
- ✓ Environmental Restoration
- ✓ Leisure Construction



Revenue 2018: € 48,5 mln



78 Employees



# «DIGITAL»

Regional Fact&Features

President



**Stefano Bossi**  
CEO Vem Sistemi Spa



Value  
Chain  
Cluster  
*by kind  
of activities*

Total	~ 1,500	~ 16,000	~ 3,5 Bln €
SW&HW solutions	42%	43%	34%
IT Consulting	28%	24%	19%
Distributors	23%	18%	31%
HW Production	7%	15%	16%



EXPORT



Exporting Companies

10%

Turnover exported

5%



## VEM Sistemi

VEM Sistemi is a system integrator and an all-round smart company, founded in Forlì in 1986, with offices in Milan, Modena, Padova, Rome and Senigallia. In the last 5 years the company has doubled its turnover, passing from 22 million euros in 2012 to 50 million in 2017. Today the Group has 245 employees and 800 customers, with a particular focus on medium-sized businesses.

In 33 years of activity, VEM has been providing ICT services and solutions by combining expertise with world-class technology.

Thanks to its unique holistic vision, VEM is able to offer and to integrate different systems and services: network infrastructures, data center, cloud technologies, collaboration solutions, cyber security, building digitalization, custom software development.

The real strength of VEM Sistemi is the capacity to guide customers towards a smart identity, shaping and combining innovative technologies to meet their real needs.

## VEM Sistemi Group

In May 2013, VEM founded CERTEGO, a startup based in Modena, specialized in threat intelligence and cyber security services, strengthening an already rich IT security offer, which has evolved over the years along with the needs and dynamics of the market.

In August 2015 another important enterprise joined the group with the acquisition of myDev, a company specialized in custom application development which represents a strong boost for new IoT and Big Data offers.



# «ELECTRONICS & MECHATRONICS»

Regional Fact&Features

President



**Romano Volta**

Datalogic Spa



Value  
Chain  
Cluster  
*by kind  
of activities*

**Total**

~ 490

~ 11,000

2,5 Bln €

Products

39%

38%

36%

Subcontractors

32%

28%

20%

Distributors

29%

34%

44%



**EXPORT**



Exporting Companies

44%

Turnover exported

23%

DATALOGIC is a global technology leader in barcode readers, automatic data capture and process automation control.

- ✓ Retail: we are the n. 1 supplier in all supermarkets
- ✓ Transportation & Logistics
- ✓ Manufacturing and warehousing
- ✓ Healthcare



- ✓ Direct presence in 30 countries
- ✓ Almost 3.100 employees
- ✓ Over 1.200 patents

**2017 Figures:** Revenues: € 606 Million  
EBITDA: € 103,3 Milion  
Net profit: € 60,1 Million  
R&D investments: 10% of revenues

## **Future:**

The future of barcode is wide open, in any market segment. Automatic Identification increasingly requires not only barcode readers, but also Machine Vision Systems and Artificial Intelligence. Industry 4.0 and the e-commerce generate an ever increasing demand associated to: Robot-Assisted Guidance, Smart Machinery and Big Data Systems.



# «ENERGY»

Regional Fact&Features

President



**Claudio Fiorentini**  
Gruppo Enel



Total		~ 700	~ 9,300	~ 5,7 Bln €
Value Chain Cluster <i>by kind of activities</i>	Energy Production	25%	23%	63%
	Distributors	14%	10%	15%
	Energy/Oil storing & services	61%	67%	22%



EXPORT



Exporting Companies

11%

Turnover exported

7%



Enel is a multinational power company and a leading integrated player in the global power, gas and renewables markets. It is one of Europe's largest utilities and figures among Europe's leading power companies in terms of installed capacity and reported EBITDA.

The Group is present in over 30 countries worldwide, producing energy with more than 89 GW of managed capacity.

Enel distributes electricity and gas through a network of over 2.2 million kilometres, and with around 73 million business and household end users globally, the Group has the largest customer base among its European peers.

Enel's renewable business line Enel Green Power already manages around 43 GW of wind, solar, geothermal and hydropower plants in Europe, the Americas, Africa, Asia and Australia.



# «FACILITIES»

Regional Fact&Features

President



**Cristian Fabbri**

Hera Comm Srl



Value  
Chain  
Cluster

*by kind  
of activities*

Total		~ 3,000	~ 53,000	~ 4,5 Bln €
Value Chain Cluster <i>by kind of activities</i>	Finance	69%	50%	/ (*)
	Waste management & water	7%	15%	46%
	Buildings services	11%	28%	39%
	Other services	13%	7%	15%

(\*) The financial report of finance companies are not comparable with those of non-finance companies.



**EXPORT**



Exporting Companies

4%

Turnover exported

1%



## HERA: ENERGY, WATER AND ENVIRONMENT

A national leader in waste, water and energy services, the Hera Group represents an unique entrepreneurial formula in Italy.

Born in 2002 out of the aggregation of 11 municipal companies operating in Emilia-Romagna, first corporation of its kind nationwide, over time Hera has embarked on a journey of consistent and balanced growth, incorporating other companies active in the same areas.

Hera, publicly listed since 2003, is now among the nation's largest multi-utilities and works mainly in the environment (waste management), water (aqueduct, sewerage and purification) and energy (electricity, gas distribution and sales, energy services) sectors. Other services offered include public lighting and telecommunications. Its range of activities undergoes continuous and constant development, and reflects the five levers on which the Group's strategic orientation is founded: growth, efficiency, excellence, innovation and agility.

Within the panorama of public services in Italy, the Hera Group's leadership can easily be recognised in a few figures: almost 9,000 employees who meet the needs of 4.4 million citizens in approx. 350 municipalities in Emilia-Romagna, Friuli Venezia Giulia, Marche, Veneto and Tuscany.

### 5th operator in electricity sales

- ✓ over 3 TWh electricity sold
- ✓ 12,600 km electrical grid
- ✓ 633 thousand electricity citizen served

### 3rd operator in gas distribution

- ✓ over 3 billion m<sup>3</sup> gas distributed
- ✓ 20,900 km gas network
- ✓ 1,7 million gas customers served

### 2nd operator in the integrated water cycle

- ✓ 303 million m<sup>3</sup> water sold
- ✓ over 53 thousand km water network
- ✓ 3.6 million citizens served

### 1st operator in the waste area

- ✓ 6.8 million tonnes waste treated
- ✓ over 4 million tonnes waste commercialised
- ✓ 3.3 million citizens served

**984.6 million € EBITDA**

**6.14 billion € turnover**



# «FASHION & LUXURY»

Regional Fact&Features

President



**Stefano Orsi**

G.A. Operations Spa



Value  
Chain  
Cluster

*by kind  
of activities*

**Total**

~ 1,400

~ 19,000

~ 5,2 Bln €

Products

27%

32%

28%

Distributors

60%

57%

63%

Raw materials

13%

11%

9%



**EXPORT**



Exporting Companies

40%

Turnover exported

26%



# GA OPERATIONS

Giorgio Armani Operations (GA Operations) is the operating company of the Giorgio Armani Group that industrializes and manufactures apparel, accessories, leather goods, bodywear and bijoux for the brand names of the Group: **Giorgio Armani**, **Emporio Armani**, **EA7** and **Armani Exchange**.

The company is headquartered in Modena and is located in 5 industrial sites in Italy and 1 in Hong Kong. Industrial sites in Italy are in Mattarello di Trento (Tn), Trissino (Vi), Vertemate con Minoprio (Co), Fossò (Ve), Modena.

The Giorgio Armani Group is one of the leading fashion and luxury goods groups in the world today with:

**10,500** direct employees,

**12** production plants and more than **2,704** boutiques,

in **60** countries around the world.



# «HEALTH»

Regional Fact&Features

President



**Giuliana Gavioli**

B. Braun Avitum Italy Spa



Value  
Chain  
Cluster

*by kind  
of activities*

**Total**

~ 850

~ 31,000

~ 3,1 Bln €

Medical devices  
& components  
productions

14%

4%

8%

Distributors

38%

22%

47%

Hospice &  
Human Care

48%

74%

45%



**EXPORT**



Exporting Companies

16%

Turnover exported

12%

B. Braun Avitum Italy S.p.A. is part of B. Braun, German Group counting on the support of approximately 63.000 employees in more than 65 countries in the world.

B. Braun leading principle is Sharing Expertise: to the Group it means continuously developing effective solutions through constructive dialogs with customers and partners.

B. Braun Avitum Italy belongs in particular to the Avitum Division, whose expertise is focused on extracorporeal blood treatments such as hemodialysis, acute dialysis and apheresis; the Italian subsidiary is specifically active in the design and production of non-active medical devices for extracorporeal blood treatments as well as for enteral and parenteral nutrition.

Furthermore, B. Braun Avitum Italy deals with the distribution and technical assistance for the whole extracorporeal treatment portfolio.

Founded in 1991 in Mirandola, the company was originally named B. Braun Carex; it was then appointed as Center of Excellence for extracorporeal tubing system and vascular access in year 2007.

Despite the damages caused by year 2012 earthquake, B. Braun Avitum Italy was able to never cease its activity.

Since then, B. Braun Avitum Italy has more than doubled the number of employees as well as the production area surface, also thanks to the introduction of innovative manufacturing equipment.

B. Braun Avitum Italy looks forward to the future with a solid commitment in improving patient's quality of life.



# «HOME»

Regional Fact&Features

President



**Paolo Castelli**

Paolo Castelli Spa



Value  
Chain  
Cluster  
*by kind  
of activities*

Total	~ 1,300	~ 27,000	~ 7,9 Bln €
Raw Materials	15%	18%	20%
Products	31%	48%	43%
Distribution	41%	18%	21%
Machinery	13%	16%	16%



**EXPORT**



Exporting Companies

38%

Turnover exported

40%



## PAOLO CASTELLI

Paolo Castelli S.p.A. is an Italian company leader in the field of general contracting and design at international level, able to manage important public and private turnkey projects, tailor-made furnishing supplies in the hospitality, retail, office, museum, marine sectors, with 2 lines of own furniture collections with which participates every year at the Milan furniture Fair.

Born of a long family tradition of 140 years in the field of furniture and contract supplies, the company has been able over the years to take advantage of market changes - between craft and industry - becoming a dynamic and flexible institution, capable of providing a turn-key service tailored to customer needs.

The company - 110 employees&partners and an expected turnover for 2018 of almost 30 million euros - has its headquarter located in Ozzano dell'Emilia (Bologna), a showroom in Milan in the heart of the prestigious Brera district, and a Marine division in Carrara to manage naval supplies.

Through its team of 40 internal people as engineers, designers, architects, graphics, the company operates in the Contract field with a tried and tested team of architects, engineers, designers and technicians, capable of developing all the different steps of the project in close collaboration with the Client, ensuring a technical support from the executive phase to that of engineering design. The company also has a strong logistics system and coordination - on site and off site - which is integrated into the technical and design-technical and fitout phases creating specific teams for each project and providing the best possible execution respecting timing. The company operates globally both in furnishing and in contract projects, from civil works to interior finishes. Markets in which the company is most active are - in addition to Italy, the Anglo-Saxon and in particular London, moreover interventions in China, in France (Paris) and at the Principality of Monaco. It is also opening the Russian, Arab and the Indian market, proof that the aesthetic appeal of the product line Inspiration has been able to intercept a new sector of the market with a very strong potential.



# «INDUSTRIAL VEHICLES»

Regional Fact&Features

President



**Ambrogio Bollini**

Toyota Material Handling Manufacturing Italy Spa  
e L.T.E. Lift Truck Equipment Spa



Value  
Chain  
Cluster

*by kind  
of activities*

**Total**

~ 210

~ 7,800

~ 2,3 Bln €

Vehicles  
production

32%

34%

36%

Distributors

37%

16%

27%

Vehicles  
components  
productions

31%

50%

37%



**EXPORT**



Exporting Companies

48%

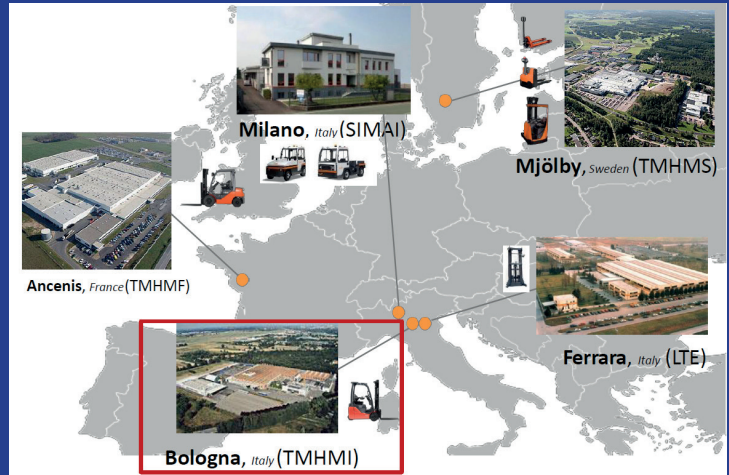
Turnover exported

50%

## MATERIAL HANDLING

### TMHE Supply - Footprint

- 5 Factories
- ~3500 employees
- 3 R&D Centers
- ~300 Design Engineers



### Bologna Factory in figures

Products	E and IC CB's forklift trucks
Activities	R&D, Manufacturing, Customization
Brands	Toyota, BT, CESAB
Employees	546 (including Parts & Cesab brand)
ISO 9001	year 2000
ISO 14000	year 2006
OHSAS 18001:2007	year 2009
ISO 50001	year 2015
Site	67.000 m <sup>2</sup>
Covered	28.940 m <sup>2</sup>
Offices	2.800 m <sup>2</sup>



# «MACHINE TOOLS»

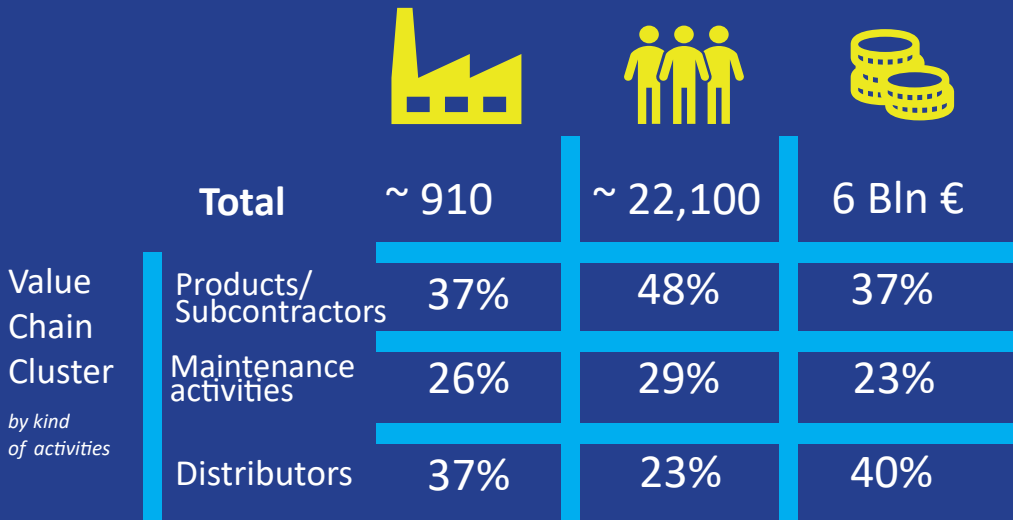
Regional Fact&Features

President



**Riccardo Fava**

Baltur Spa



**EXPORT**



Exporting Companies

57%

Turnover exported

47%





Energy for People

Baltur is a leading company in climate technologies, a top brand with more than 70 years of experience, which has reached a balance between technology and comfort, performance and energy efficiency, design and sustainability.

From 1950 onwards, Baltur designs and produces “intelligent” solutions for heating, climate control, industrial and process applications, managing energy rationally and effectively. Each product is covered by punctual and customized services, ensuring assistance, training and specific solutions for the customer.

Products we supply: burners from 16,6 kW to 50 MW for every kind of fuel, wall-mounted and floor-stand boilers, thermal units, heat pumps, air conditioning systems, chillers and water heaters.

Solutions ‘made in Italy’ characterized by: maximum efficiency, low environmental impact, low operational and maintenance costs.

Nowadays, the excellence of the product - together with continuous investments in R&D and innovation - allows Baltur to take a leading role between the industrial players in this sector at a national and global level.



# «METALS & COMPOSITE MATERIALS»

Regional Fact&Features

President



**Franco Iorio**

C.P.C. Srl



**Total**

~ 1,300

~ 19,000

5 Bln €

Value  
Chain  
Cluster

*by kind  
of activities*

Raw materials  
treatment

3%

3%

14%

Products/  
Subcontractors

85%

90%

69%

Distributors

12%

7%

17%



**EXPORT**



Exporting Companies

30%

Turnover exported

14%



Cpc is a global leader in composite technology and production for light weight structures

- ✓ Autoclave capacity for full management of vehicles
- ✓ Internal full management from A to Z (all components)
- ✓ Quality full traceability
- ✓ World leader in composite pressing



- ✓ Direct presence in Europe and US
- ✓ Almost 600 employees

**2017 Figures:** Revenues: € 45 Million  
EBITDA: € 7 Milion  
Net profit: € 4.5 Million  
R&D investments: 10% of revenues

#### **Future:**

**Redesign of automotive light-weight assembly**

**Engineering of new automotive lay-out composite solutions**

New production concept for light-weight composite components in mass production



# «MOBILITY & LOGISTIC»

Regional Fact&Features

President



**Alessandro Tullio**

Ferrovie dello Stato Spa - Trenitalia



Value  
Chain  
Cluster

*by kind  
of activities*

## Total

~ 800

~ 24,000

~ 4,7 Bln €

Vehicles production  
& components

5%

4%

4%

Sales & Rental

12%

7%

20%

Freight Services

71%

79%

66%

Transport Support  
Services

12%

10%

10%



EXPORT



Exporting Companies

12%

Turnover exported

4%

**Ferrovie dello Stato Italiane Group** (Italian State Railways) is a solid industrial company with financial figures that are amongst the best in Europe and confirms its position as the main industrial group by investments (5,6 billion euros) in Italy. Every day, about 82,000 employees handle over 10,000 trains a day, of which 8,000 in Italy and 2,000 abroad, and 250,000 bus/kilometres. FS Italiane transports around 750 million passengers by train every year (600 million in Italy, 150 million abroad), 300 million by bus and 50 million tonnes of freight. The rail networks, managed by Rete Ferroviaria Italiana, is over 16,800 kilometres with 1,350 reserved to high-speed trains.

**Trenitalia**, the group's transport company, is one of the most important railway operators in Europe, and the jewel in the crown of its fleet is the Frecciarossa 1000 supertrain, which has decreased travel times between the most important cities in Italy. Italy's high-speed rail system, which is a world leader, has changed Italians' lifestyles and working habits. The new Rock and Pop trains, which will enter service from May 2019, are part of a fleet of 600 new regional trains purchased with a 6 billion investments. This is an unprecedented plan in the history of Italian railways.



# «PACKAGING»

Regional Fact&Features

President



Angelos Papadimitriou

Coesia Spa



Value  
Chain  
Cluster  
*by kind  
of activities*

Total	~ 350	~ 12,000	4 Bln €
Machinery	47%	61%	61%
Packaging	44%	38%	35%
Distributors	9%	1%	4%



EXPORT



Exporting Companies

57%

Turnover exported

77%

## Coesia: who we are

Coesia is a group of innovation-based industrial and packaging solutions companies operating globally, headquartered in Bologna, Italy, and fully owned by Isabella Seràgnoli.

Coesia's companies are leaders in:

- ✓ Advanced automated machinery and packaging materials
- ✓ Industrial Process Solutions
- ✓ Precision gears
- ✓ Ceramics

GROWTH DYNAMICS			
SALES mln €	1,586	~1,750	~2,250
EMPLOYEES	7,002	~7,900	~9,000
EBITDA mln €	~308	~360	~450
	2017	2018F	2019F

### A BROAD EUROPEAN BASE & GLOBAL PRESENCE

- 22 companies headquartered in 8 countries
- Direct presence in 32 countries
- 64 production facilities

### REVENUES BALANCED GLOBALLY

- ~ 35% EU (~ 3% Italy)
- ~ 25% ASIA
- ~ 20% NORTH AMERICA

### ENGINEERING & INNOVATION

- ~ 150 mln € invested in 2018 with ca. 1,500 dedicated staff

## Coesia companies



ACMA - CIMA - COMAS  
EMMECI - G.D - GDM - GF  
IPI - SASIB  
SYSTEM CERAMICS



ATLANTIC ZEISER  
TRITRON



FLEXLINK - NORDEN



CERULEAN - MOLINS



CITUS KALIX - SACMO



VOLPAK



HAPA



MGS - R.A JONES



# «PAPER & PRINTING»

Regional Fact&Features

President



**Paolo Golinelli**

Golinelli Communication Lab Srl



Value  
Chain  
Cluster

*by kind  
of activities*

Total	~ 400	~ 5,700	~ 1,3 Bln €
Publishing	24%	25%	27%
Distributors	18%	9%	17%
Printing & Machinery	44%	54%	39%
Commodity & Raw Materials	14%	12%	17%



**EXPORT**



Exporting Companies

25%

Turnover exported

7%



Golinelli has specialised in graphics since 1951 and led every development in high quality printing for Automotive, Ceramic Tile and Luxury. Today, we offer companies a truly complete communication service.

As a result of major acquisitions in the communication sector, today Golinelli Communication Lab is a genuine communication laboratory and a creative workshop for projects and products where ideas take shape and are transformed into visual language, symbols and colours. We develop new ways to combine colour, paper and technology to improve the quality of catalogues, books, video-booklet, and display units in response to demand from a continuously evolving market.

We are located in the Motorvalley area (near Modena) and have a representative office in Paris and Florianopolis.

- ✓ 2018 Revenue: 8 millions Euro
- ✓ Employees: 47



# «PLASTIC»

Regional Fact&Features

President



**Simone Colombarini**  
Vetroresina Spa



Value  
Chain  
Cluster  
*by kind  
of activities*

Total	~ 270	~ 4,700	~ 1,1 Bln €
Products	84%	93%	92%
Distributors	16%	7%	8%



EXPORT



Exporting Companies

56%

Turnover exported

25%



**Vetroresina** was founded in 1968 in Portomaggiore (FE). Since the beginning, the activity was concentrated to manufacture glass fibre-reinforced polyester resin laminates, dedicated mainly to the construction of refrigerated trucks.

Attentive research into the field of composite materials combined with continuous research and development of the processing techniques have enabled the company to expand its market, first in Europe, and then in the rest of the world, introducing also the use of GRP laminates in the motorhome and caravan market.

Vetroresina has made substantial investments to maintain and increase the production level. With the help of advanced technology and close relationships with universities and industry experts, the company has managed to identify changes and new requirements arising in the market.

In June 2000 Vetroresina inaugurated a production facility in São Paulo, Brazil, to meet the requirement of the South American market and in May 2008 completed the construction of a new manufacturing plant in the USA from where it can serve the North American market.

Today Vetroresina S.p.A., after several investments in all the three plants, has a manufacturing capacity of about 9 million m<sup>2</sup> per year of GRP laminates with a consolidated turnover of about 65 millions euros and employs about 200 people.



# «PROFESSIONAL SERVICES»

Regional Fact&Features

President



**Michele Bonfiglioli**

Bonfiglioli Consulting Srl



Value  
Chain  
Cluster

*by kind  
of activities*

Total	~ 1,400	~ 19,300	~ 1,8 Bln €
Business consulting	37%	15%	26%
Technical Advice	19%	11%	15%
Legal & Finance Advice	17%	17%	19%
Advertising	15%	10%	24%
Temp Agency	12%	47%	16%



EXPORT



Exporting Companies

5%

Turnover exported

2%

A global reach and the capability to fully understand what counts: that's who we are.

Founded in 1973, Bonfiglioli Consulting is today ranked among top Italian managing consulting companies.

Italian and International offices, along with the Cordence Worldwide Partnership, allow us to offer our clients a highly customized global know-how based on innovation and pragmatic approaches. Bonfiglioli Consulting is the point of reference for Operations in Europe, promoting innovation and people oriented company culture in all processes.

With 10 offices worldwide and 80 employees, our consultants have on average of over 10 years experience in industry and consulting.

Bonfiglioli Consulting can today count about

**200**

**current clients**

among Multinationals as well as SMEs

**over 95%**

**successful applications**

in 2017

for a total value of

**8,5**

**million euros**



# «TOURISM & CULTURE»

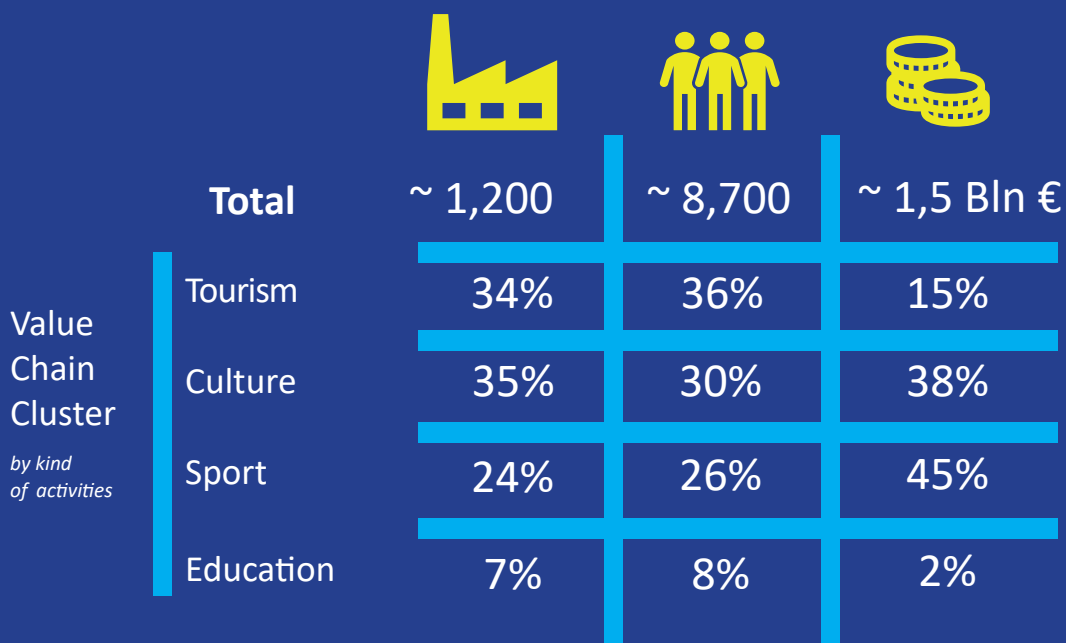
Regional Fact&Features

President



**Patrizia Bauer**

M. Casale Bauer Srl



**EXPORT**



Exporting Companies

2,8 %

Turnover exported

2,3 %



M. Casale Bauer was founded by Hans Bauer in 1948 in Bologna. Mr. Bauer started distributing musical instruments accessories and was one of the Italian music industry's indisputable pioneers; he was committed to keep the company one of the leading of the M.I. business in our country; and followed the market development of the musical instruments collecting many important brand names and created our dynamic company: this year 2019 the company is marking its 71st year in the music business. M. Casale Bauer is one of the most important companies in the imported musical instruments distribution in the whole Italian market, known all over the world. We sell the products we distribute to more than 600 dealers located all over Italy. We represent on an exclusive base the following Musical Instruments brand names:

*GUITARS and guitars acc.:* **GUILD, CORDOBA, WASHBURN, KOHNO-SAKURAI, SEYMOUR DUNCAN, RICKENBACKER, SPECTOR BASSES, DIGITECH**

*STRINGS:* **ELIXIR by Gore, AUGUSTINE, THOMASTIK-INFELD, PYRAMID, JARGAR**

*AMPLIFIERS:* **HUGHES & KETTNER, AMPEG**

*DRUMS and acc.:* **MAPEX, REMO, REGAL TIP**

*WIND INSTR. and acc.:* **JUPITER, XO, ALTUS, AZUMI, NUVO, COOLWIND, BABBITT, HERCULES, NOMAD**

*TUNER/METRONOMES:* **SEIKO, BERGEN, WITTNER**

*PEDALS and EFFECTS:* **DIGITECH, DOD, SOURCE AUDIO, FOXGEAR, BARONI LAB, GURUS, SEYMOUR DUNCAN PEDALS**

*PROFESSIONAL EFFECTS:* **TUBE TECH**

*MICROPHONES:* **DPA, CAD**

*PA EQUIPMENT:* **EAW and OUR PROPRIETY BRANDS D-AUDIO and MCB AUDIO**

Most of the above mentioned brands are part of our catalog since long time, which explains the vital importance that we put on the real meaning of the partnership. Just to name a few, we are partnered with Thomastik and Wittner since 1948, with KHS since the very early 80s, Harman Group (Digitech) since the late 80s, Ampeg marks almost 40 years together this year and DPA since 1993. We also have a professional audio network which consists of 4 specialist (PMs and salesmen) that are demoing and selling to specialized dealers, recording and post-production studios, and broadcast Radio and TV companies all over Italy, whereas the 90% of the professional business is mostly based in Milano and Roma.



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[www.confindustriaemilia.it](http://www.confindustriaemilia.it)