

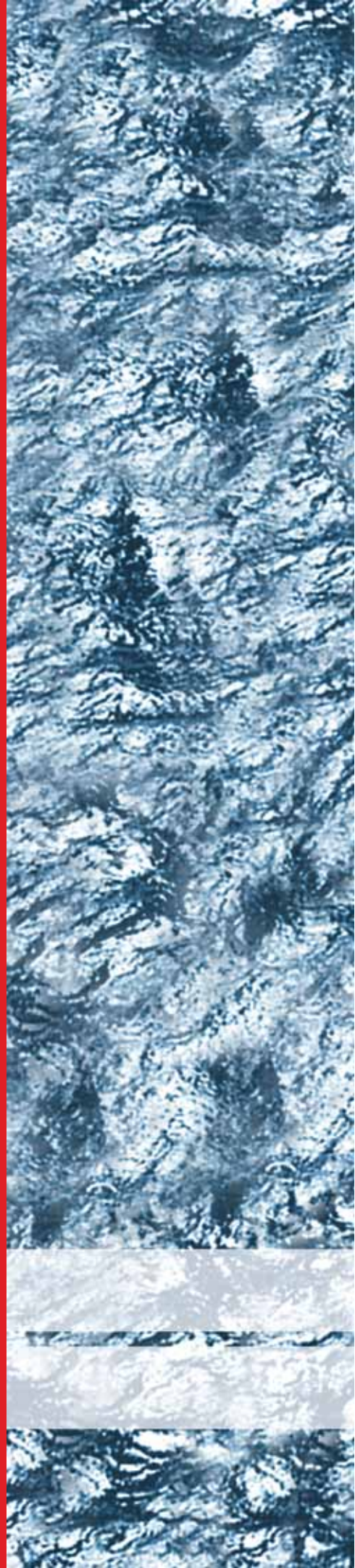


Frosinonee

a competitive

economy





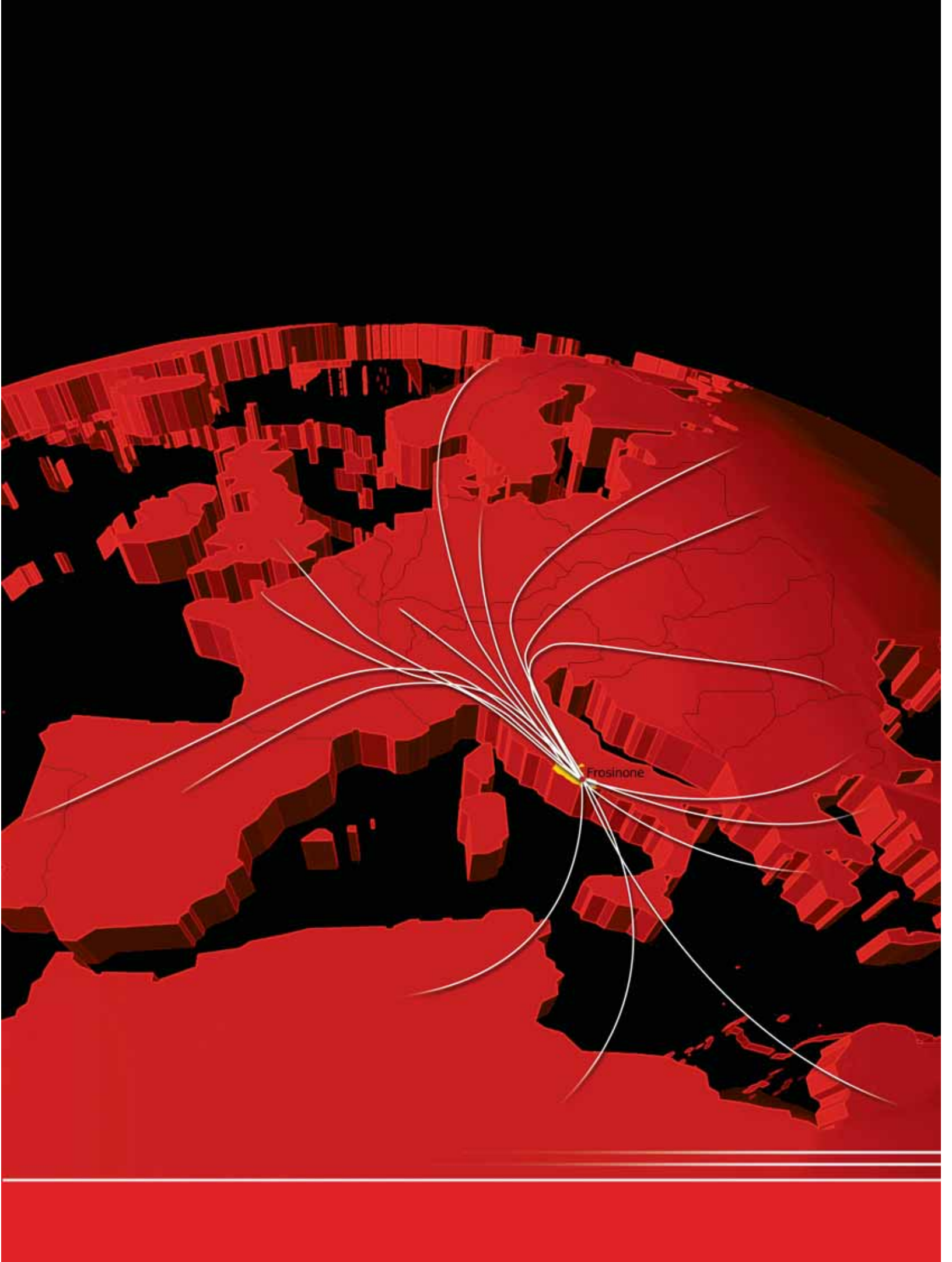


Frosinone

a competitive economy



A.SP.IN, the Special Agency of the Frosinone Chamber of Commerce, was founded in order to encourage the entry of local companies in foreign markets through partnerships, targeted agreements and common programmes. Within the worldwide promotional activities carried out aimed to sustain the creation of new commercial businesses between companies, A.SP.IN. has created, now at its second edition, a valid abstract of Frosinone economy in which are highlighted structural characteristics and excellence factors.



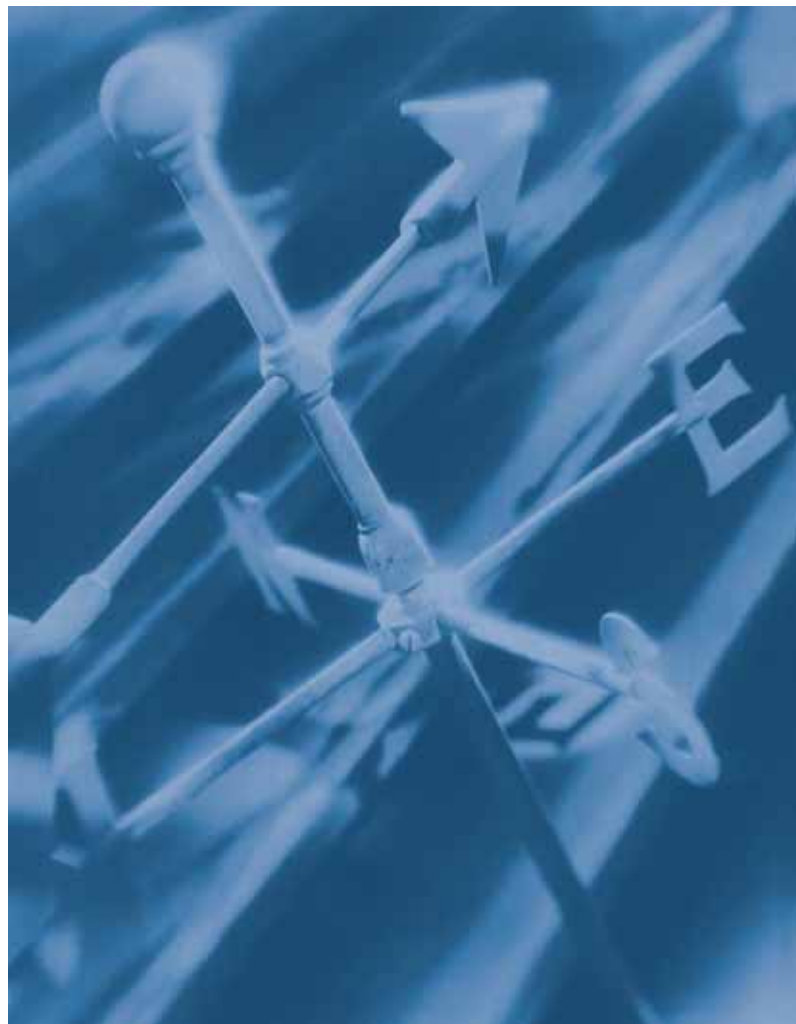
Geographic position and general information ■■■

The province of Frosinone is situated in the heart of the Italian peninsula. It covers some 3.244 square kilometres and with more than 485.000 citizens it is the fifth most populated area of Central Italy. The territory, which is divided into 91 municipalities, is strategically placed between the two main centres of Rome and Naples, as well the Adriatic and Tyrrhenian Seas. Its geographic position is well-served by a good transport infrastructure that includes the A1 motorway and the railway network; and these have been partly responsible for the growth and consolidation of the local economy. It is also possible to travel to Frosinone from the international airports situated in Rome and Naples.

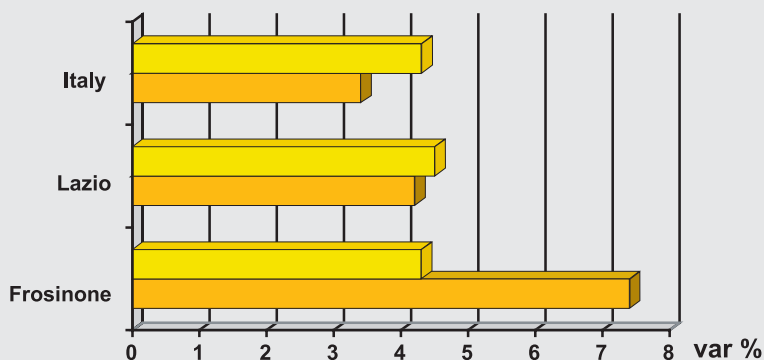
In 2004 the local economy comprised more than 43.800 businesses in a number of different sectors: industry arts and crafts, trade, agriculture and tertiary service industries. The province of Frosinone is well-represented by private tertiary service industries such as transports, trade and services while the manufacturing sector is highlighted by chemical, metal-mechanical, pharmaceutical, engineering, furniture, clothing, marble, food and building companies. The gross domestic product of Frosinone increased its value in 2003, compared to 2002, of 7,4% reaching 9.000 millions of euros.

The Province's wealth comes from tertiary industries (68,2%) and industry (30,1%) with agriculture making up the remainder (1,7%).

In 2004, the number of people in the workforce was 186.000. People engaged in employment numbered 166.000 of which those in agriculture constituted 3.000 (1,8%), those in industry represented a further 65.000 (39,2%) and those in tertiary industries another 98.000 (59%).

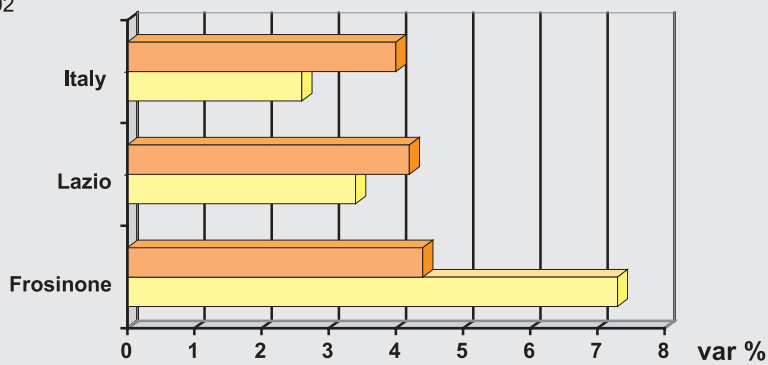


The economy numbers



■ Average annual GDP rate 2003/1995

■ GDP % variation 2003/2002



■ Average annual GDP per capita rate 2003/1995

■ GDP per capita % variation 2003/2002

GDP (Gross Domestic Product) 2003

8.955 millions

% var 2003/2002

Frosinone: + 7.4

Lazio: + 4.2

Italy: + 3.4

Average annual rate 2003/1995

Frosinone: + 4.3

Lazio: + 4.5

Italy: + 4.3

GDP per capita 2003

17.950 Euro

% var 2003/2002

Frosinone: + 7.3

Lazio: + 3.4

Italy: + 2.6

Average annual rate 2003/1995

2003/1995

Frosinone: + 4.4

Lazio: + 4.2

Italy: + 4.0

Infrastructural endowment - 2004



n.i. Italia = 100

Road network	196,9
Railway network	60,6
Ports	28,1
Airports	126,6

TOTAL 81,3



2003 Sectorial distribution of GDP
LAZIO - ITALY

Areas	Agriculture %	Industry %	Services %	Total %
Frosinone	1,7	30,1	68,2	100
Viterbo	6,6	22,8	70,6	100
Rieti	4,4	24,8	70,9	100
Roma	0,5	13,7	85,7	100
Latina	5,1	32,5	62,4	100
Lazio	1,3	17,0	81,7	100
<i>Italy</i>	2,5	26,6	70,9	100

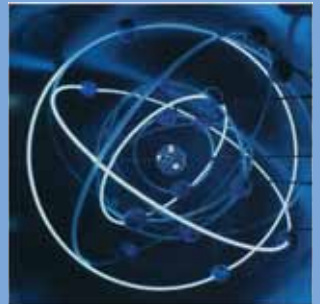
Sectorial distribution of GDP



2003 Sectorial distribution of GDP Frosinone



2003 Sectorial distribution of GDP Lazio

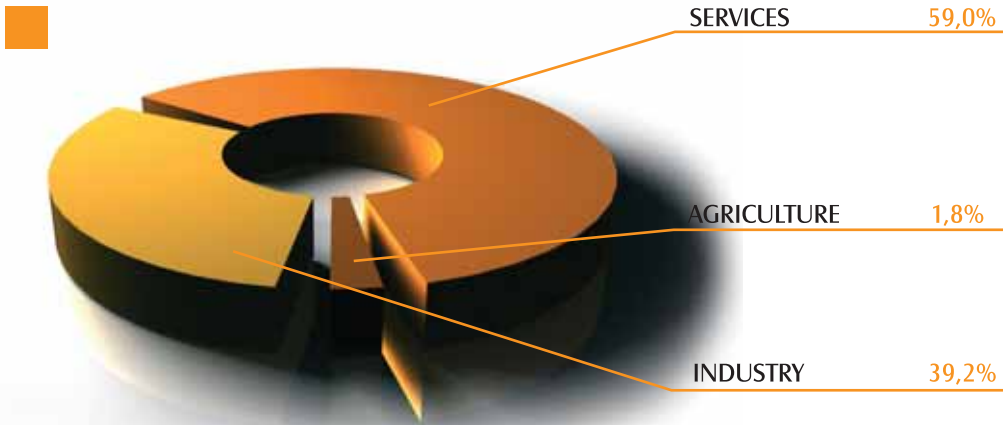
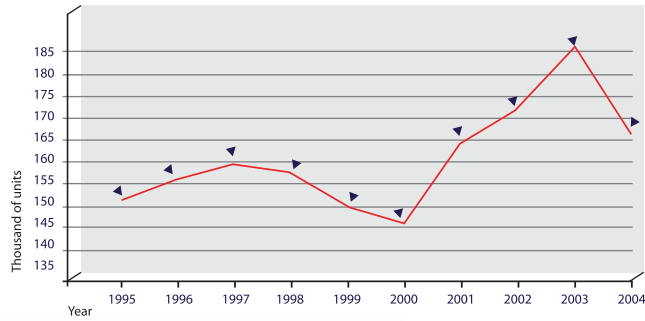


Employment 2004

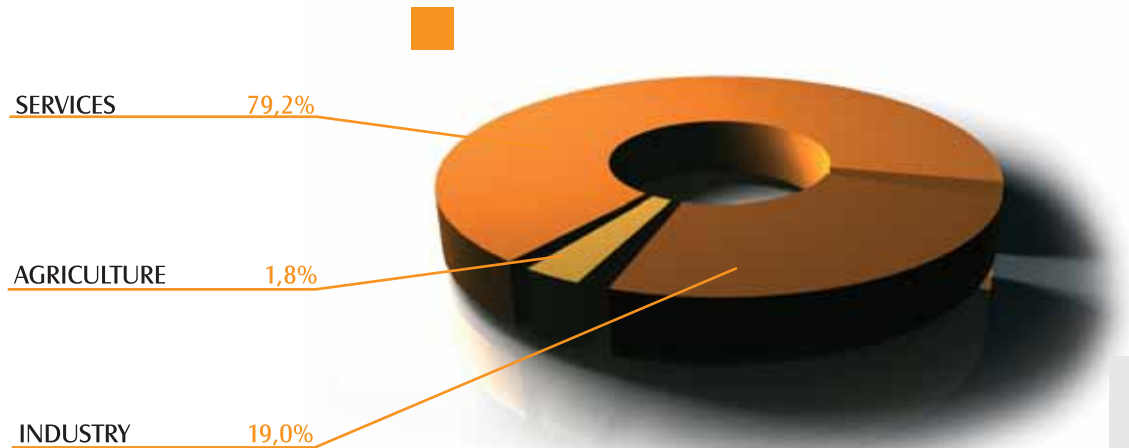


Manpower 186 thousand
 Employees 166 thousand

Employment in the Province of Frosinone



2004 Sectorial distribution of employment in the Province of Frosinone



2004 Sectorial distribution of employment in the Lazio Region



The Entrepreneurial Structure



In 2004 the province of Frosinone listed some **37.225 businesses**; of these more than 9.500 were in the **manufacturing** sector or services connected to it. These activities made up 30,1% of the province's GDP (2003 figures), surpassing the average for the Lazio Region of 17,0% and the national average of 26,6% and employed 39,2% of the province's working population.

The companies growth rate in 2004 reached 1.4 according to the national and regional averages.

The current picture highlights how, in the last 40 years, production has changed from a largely agricultural economy to one based on industry and manufacturing. Since the 60s, the industrial sector has grown and diversified with the development of modern and technologically advanced production systems specialising in **machine manufacture, chemical and pharmaceutical goods, paper products, textiles, transports, furniture making, marble products and clothing**. Over time, these industries have seen remarkable growth in both technology and productivity, creating a thriving local economy. The rise of industry in the province comes from the local financial advantages it enjoys, located as it is, in the heart of Central Italy. Also its strategic position has facilitated investment and provided a platform for several important companies: Fiat Auto, Videocolor, Bristol Myers Squibb, Henkel, Valeo, Klopman International, Agusta and ABB Sace. Alongside these giants, small and medium sized industries have developed characterised by highly professional subcontractors able to compete in national, european and international markets.

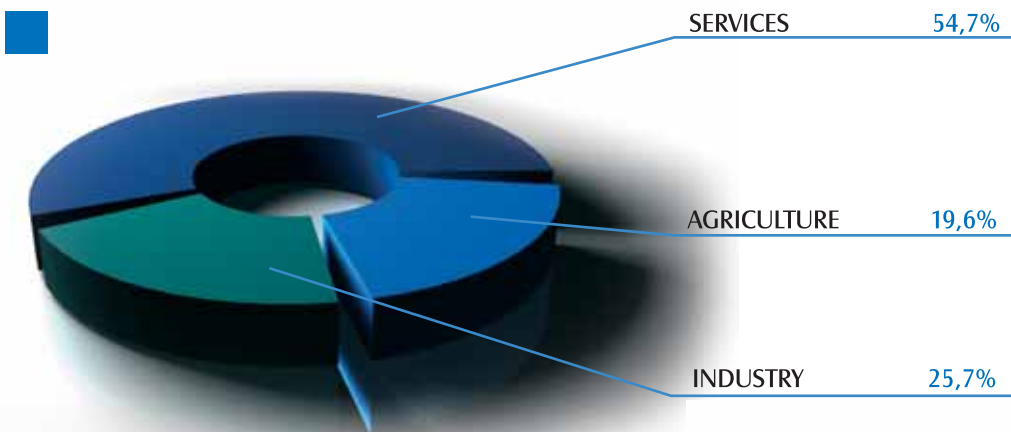
This phenomenon has grown over the last few years with the adoption by medium and large scale companies

of strategies specifically designed to create and develop 'no-core' tertiary industries. A brief analysis of the most important sectors in the province shows that there is a particular concentration on **subcontracting** services in the sectors of **mechanics, machine manufacture, components production, plastic and rubber products, electronic goods, chemical products** and those sectors linked to **industrial automation and plant engineering**.

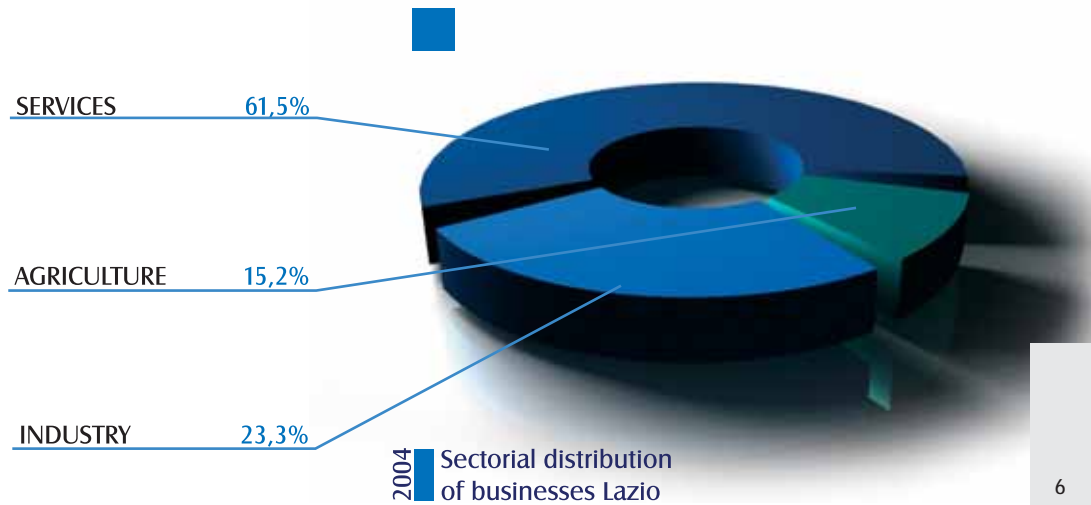




This background of strong competition has resulted in an improvement in quality among small enterprises and has contributed to the establishment of an effective and efficient system noted for innovation in both product and process. It is within this context that is set the central **logistical** and **transport network** of Frosinone. In fact it is particularly well represented by a remarkable number of leading **road transport** and **shipping companies** which creates an excellent integrated logistic hub.

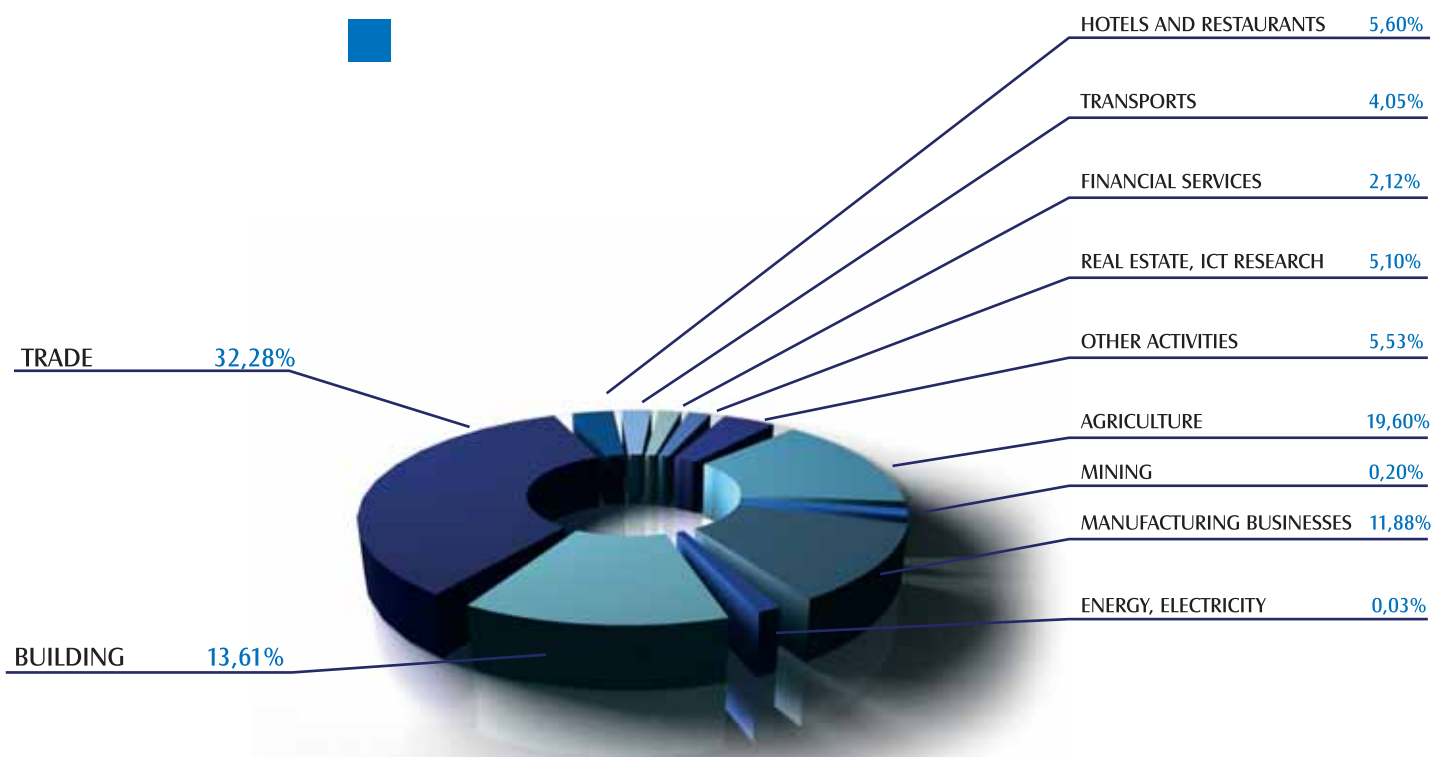


2004 Sectorial distribution of businesses
Province of Frosinone

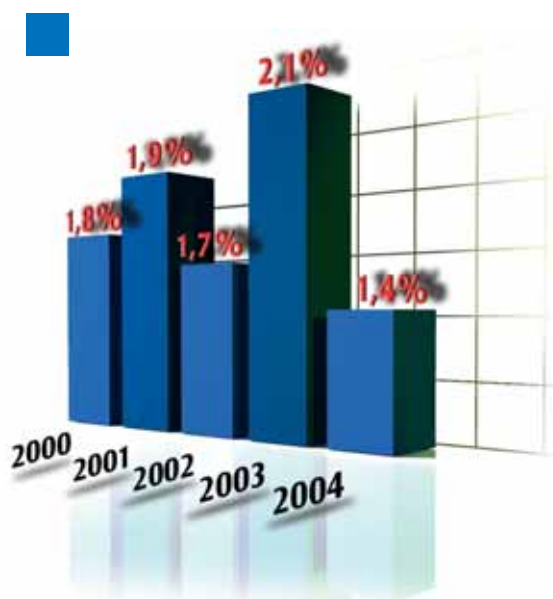


2004 Sectorial distribution
of businesses Lazio





2004 Sectorial distribution of businesses
Province of Frosinone



Businesses growth rate
in province of Frosinone





Foreign Trade

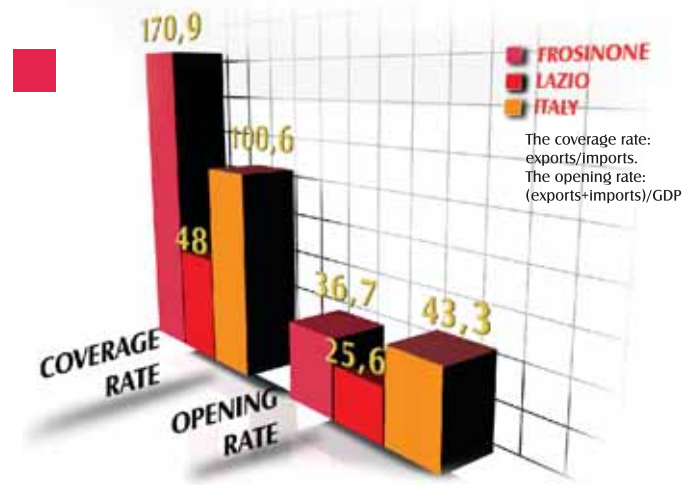
Export dynamics and market international outlets have accelerated the internationalisation of the companies in Frosinone.

This background is further amplified by the excellence of the productive system and by the geographic location of the Province, acting as the barycentre of Europe and Mediterranean area.

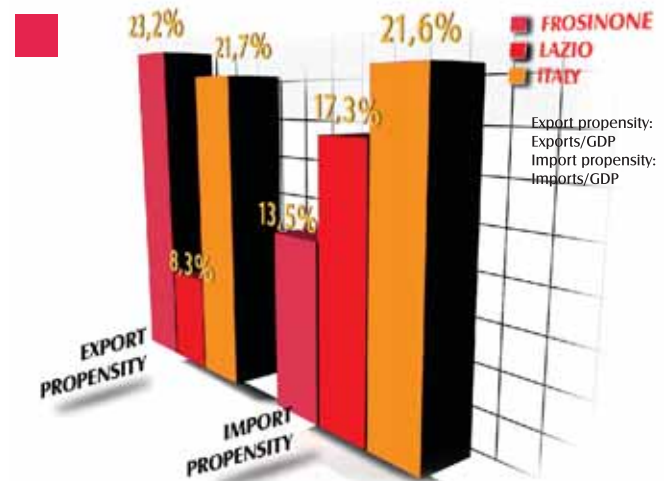
Although the weakness which has characterized worldwide economy trend and the structural problems concerning productivity, the trading rates between Frosinone and foreign markets have recorded a consistently surplus trade balance, thanks to the export increase which is still mainly addressed towards Europe.

Within this context the picture highlighted is an "open" local productive system, worldwide integrated, confirmed by statistics and economical analysis.

The importance gained by foreign trade in Frosinone economy is further established by the propensity to export.

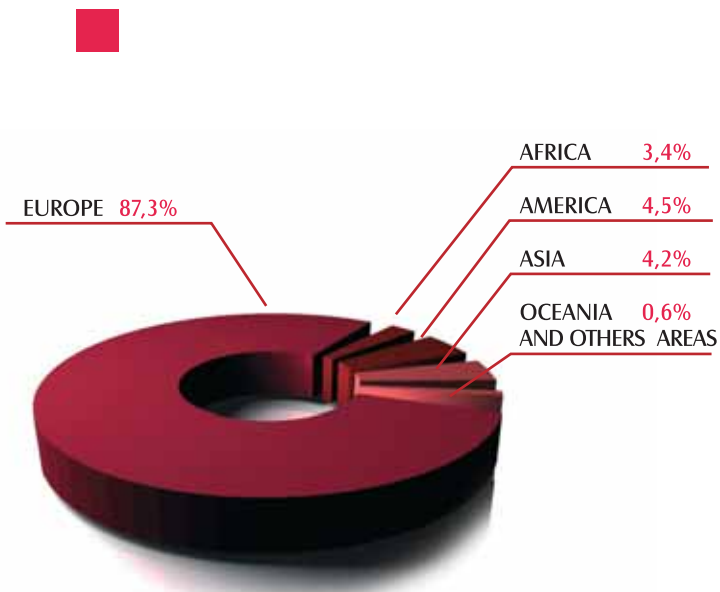


2003 Coverage rate and Opening rate of the Province of Frosinone, Lazio Region and Italy

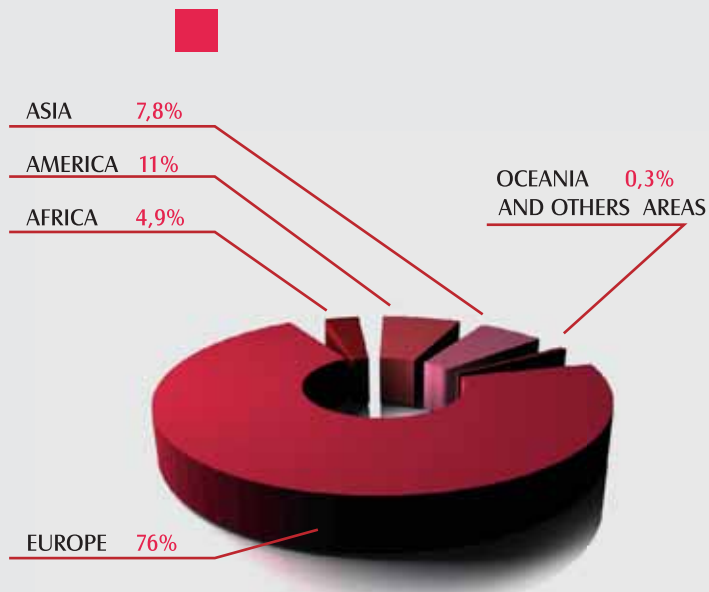


2003 Export and Import propensity of the Province of Frosinone, Lazio Region and Italy





2004 Exports in the Province of Frosinone by geographic areas 2004



2004 Imports in the Province of Frosinone by geographic areas 2004

Frosinone exports by sector (2004*)

	2004*	% Comp 2004*
A-agriculture, hunting and forestry	1.580.838	0.1
B-fishing	18.081	0.0
C-mining and quarrying	1.213.079	0.1
Da-food, beverages and tobacco	47.948.059	2.4
Db-textile and clothing	137.896.578	6.9
Dc-hide, leather and similars	1.918.537	0.1
Dd-wood and furniture	648.172	0.0
De-pulp, paper, paper products and printing	92.784.360	4.7
Df-coke, petrochemical products and nuclear fuels	113.186	0.0
Dg-chemical products, synthetic fibres	544.956.845	27.4
Dh-rubber and plastic products	169.134.758	8.5
Di-products of non metalliferous mineral workings	34.789.294	1.8
Dj-metals and metal products	51.298.870	2.6
Dk-machinery and mechanical equipment	81.784.289	4.1
DI-electrical machinery, electrical, electronical and optical equipment	355.202.079	17.9
Dm-transport vehicles	423.509.015	21.3
Dn-other manufacturing industry products	41.630.245	2.1
E-electricity, gas and water	1.309	0.0
O-other services	49.167	0.0
R-other goods	147.006	0.0
TOTAL	1.986.623.767	100.0

(*) provisional data

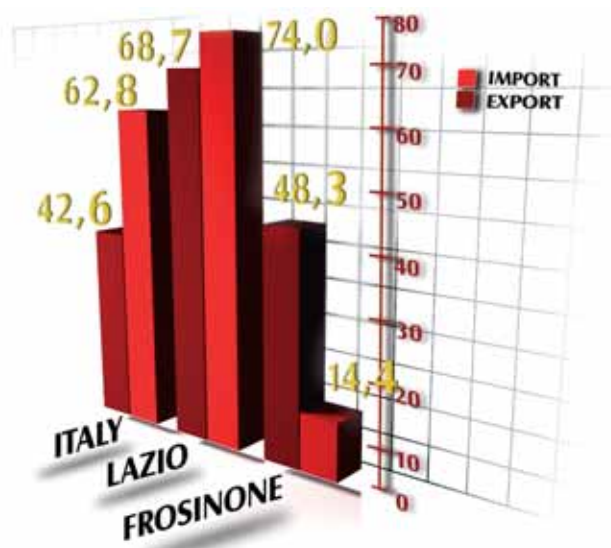


Frosinone exports and imports by geographic areas (2003-2004*)

	EXPORTS			IMPORTS		
	% by areas 2003	% by areas 2004*	% var '04*/'03 by areas	% by areas 2003	% by areas 2004*	% var '04*/'03 by areas
EUROPE	89.4	87.4	-6.4	76.6	76.0	5.1
France	16.5	15.2	-12.1	15.5	14.1	-3.6
Netherlands	1.5	1.5	-2.7	2.3	2.5	12.5
Germany	17.4	14.7	-19.0	14.9	15.5	10.3
United Kingdom	6.6	8.4	21.2	4.6	5.6	27.1
Ireland	1.0	0.8	-19.5	10.2	9.4	-1.8
Denmark	1.0	0.6	-43.1	0.3	0.4	63.5
Greece	3.2	3.3	-2.6	0.5	0.9	91.2
Portugal	1.1	0.9	-24.2	2.6	1.5	-39.7
Spain	9.1	7.9	-15.9	4.9	5.1	10.9
Belgium	2.5	2.9	10.6	7.0	6.8	2.0
Austria	3.2	3.0	-10.8	2.6	2.4	0.9
Switzerland	1.9	1.9	-4.2	0.4	0.5	32.3
Poland	7.1	6.1	-18.2	5.4	4.6	-8.4
Romania	0.3	0.7	122.2	0.3	0.4	49.0
Russia	0.7	1.4	94.4	0.4	0.2	-38.3
AFRICA	2.6	3.4	23.0	4.6	4.9	11.8
Northern Africa	2.1	2.7	23.7	2.0	2.0	10.2
Other African Countries	0.6	0.7	20.3	2.7	2.8	13.0
AMERICA	4.1	4.5	5.9	10.2	11.0	14.8
United States	2.8	3.4	17.1	5.8	6.3	14.8
Canada	0.3	0.5	41.7	0.3	0.3	3.2
Mexico	0.3	0.1	-70.7	2.9	2.9	5.8
Brazil	0.2	0.2	4.5	1.1	1.1	3.5
ASIA	3.3	4.2	21.7	8.3	7.8	-0.8
India	0.1	0.1	83.9	1.0	1.1	21.5
Singapore	0.0	0.0	-7.3	0.2	0.1	-34.5
China	0.4	0.3	-23.0	1.7	1.5	-4.1
South Korea	0.1	0.4	168.2	0.2	0.3	56.0
Japan	0.4	0.4	-9.5	2.8	1.1	-56.6
Taiwan	0.1	0.1	-31.9	0.1	0.1	102.8
Hong Kong	0.3	0.4	29.8	0.0	0.0	-28.9
OCEANIA AND OTHER AREAS	0.6	0.6	-8.0	0.3	0.3	18.8
TOTAL	100.0	100.0	-4.2	100.0	100.0	6.0

(*) Provisional Data

2004 % variation 2004/1995 Exports - Imports
Frosinone - Lazio - Italy



Exports and Imports trend
Province of Frosinone





The excellence factors

Innovation and research

Scientific research and technological innovation have resulted in the development of advanced techniques, new technologies, new materials and new products. They are two of the most crucial factors in the competitiveness and success of industry in the province. The University of Studies of Cassino and the noted research department of the Scientific and Technological Park of Southern Lazio (PA.L.MER) directly support the areas of Frosinone and Latina and provide companies based there with a steady stream of innovation.

Human Resources and the education system

The wealth and competitiveness of a region is nothing without the presence of 'thinking minds'; in effect this means that people of all levels can generate ideas and solutions for economic and social change. In this sense, the University of Studies of Cassino, combined with a high level of school attendance among its citizens, guarantees the supply of a strongly specialised and yet locally orientated workforce. The University of Cassino is made up of 5 faculties: Economy, Law, Engineering, Physical Education and Literature and Philosophy. Besides high schools and colleges, the province of Frosinone also offers highly-qualified training that is careful of development in the professional fields and in businesses.

Infrastructure and Transport

The province of Frosinone lies between the two major cities of Rome and Naples and is able to make the most of its logistical position in terms of both transport and infrastructure. The infrastructure is linked to major companies dedicated to the transport of goods. The result is a well-developed network that is continuing to grow. The road network is linked to the motorway which runs the length of the province and connects the areas to the north and south as does the railway network which, in recent years, has been developing a dedicated high-speed line.

Development is also underway on a number of multi-transport service areas that will allow companies to deposit and deliver goods across the network.

Natural riches and culture

Italy is a land that offers history, art, culture and natural beauty. The province of Frosinone also boasts riches in terms of its scenery and tourist attractions. To those who visit it, the area is a voyage between myth and legend, art and culture and palaces and papal prisons. Rediscover the sounds and tastes of an ancient culture: the Ciociaria. Frosinone province also abounds with thermal springs, natural beauty, sport, archaeology and all that is typical of a "land worth exploring".



Industrial Districts

The economic structure of Frosinone province is characterised by several different sectors and by different means of production. Within this economic landscape, two 'Industrial Districts' and one 'Local Production System' stand out. These are linked by different and shared elements: specialisation in the manufacturing sector, the division of labour between businesses, a high level of entrepreneurial skill and a balance between social and economic factors.



The Marble Industrial District

This District specialises in the mining and working of marble (Perlato Coreno type). The production system comprises a network of companies belonging to both the mining division and the manufacturing one. They specialise in the cutting and modelling of marble. The Coreno stone is an organogenic limestone composed of the remains of flora and fauna and noted for its aesthetic qualities as well as its ease of cutting. It is largely used in the building industry in Italy as well as abroad.





The Clothing Industrial District

This District specialises in clothing and more precisely, the manufacture of clothing goods and accessories. The local companies are specialists in the production of work clothes, underwear and sportswear. In general, they do not make the materials (fabric, yarns etc) but rather import them.

The system includes computer assisted design elements as well as automated processes. The area also has an interesting line in knitwear such as cardigans and pullovers etc. This District mainly works on behalf of third parties. The great names of the textile and haute couture industry are represented throughout the Valle del Liri District.

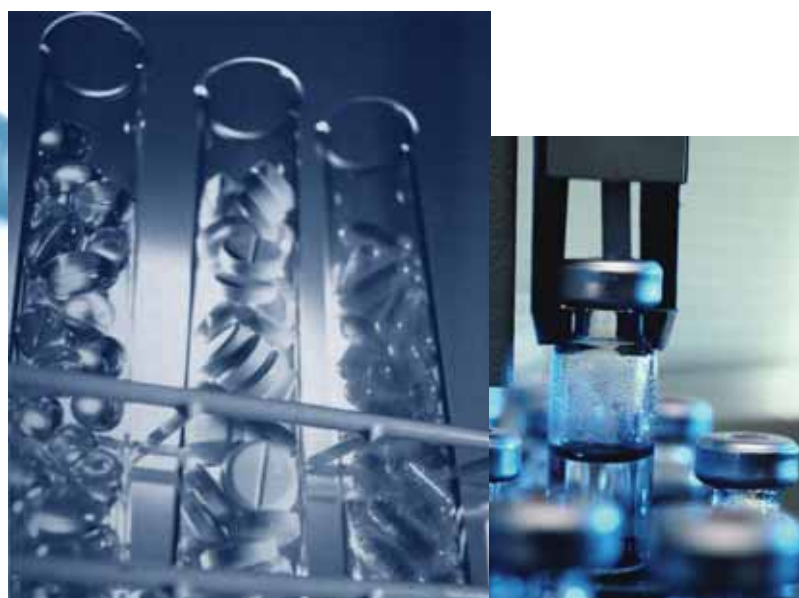


Chemical-Pharmaceutical Local Production System

The Chemical-Pharmaceutical Local Production System has an interregional character and covers areas in the provinces of Frosinone, Latina and Roma. This specialised work includes a wide range of products from pharmaceuticals to petrochemicals.

In order to support the growth and development of both the two Districts and the Local Production System, the province has at its disposal regional, national and community funds for structural and non-structural projects.

Alongside this, the province boasts an organisation, the Consortium ASI (Consortium for the Area of the Industrial Development of Frosinone) that is one of the largest in Italy. It has 5.669,5 hectares including specially equipped industrial areas and vacant industrial sites ready for new investment.





New sceneries

New instruments

New strategies

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