



# A new look at Southern Italian Regions: an attractive ecosystem for FDI and the key role of SEZ

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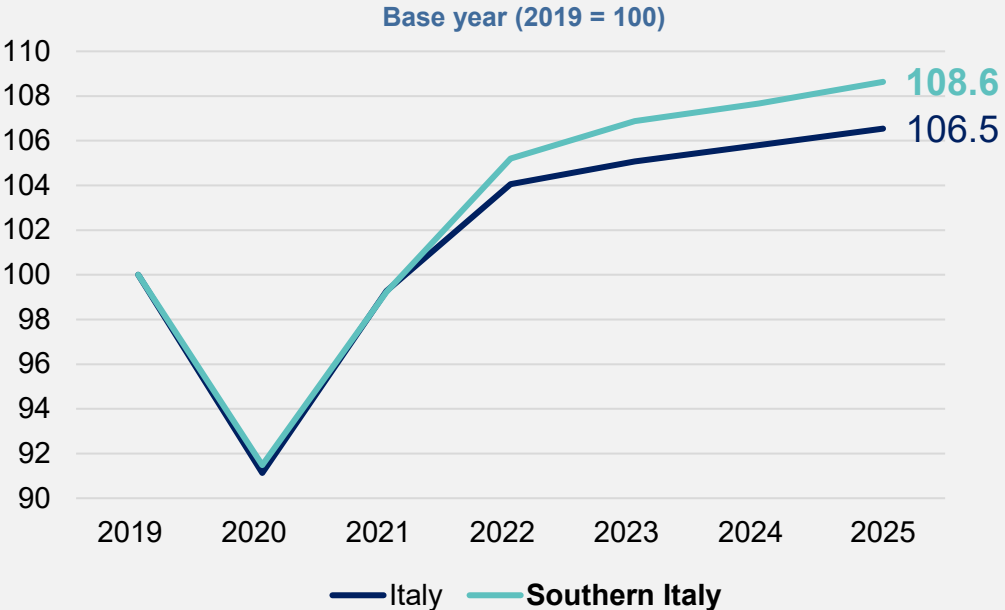
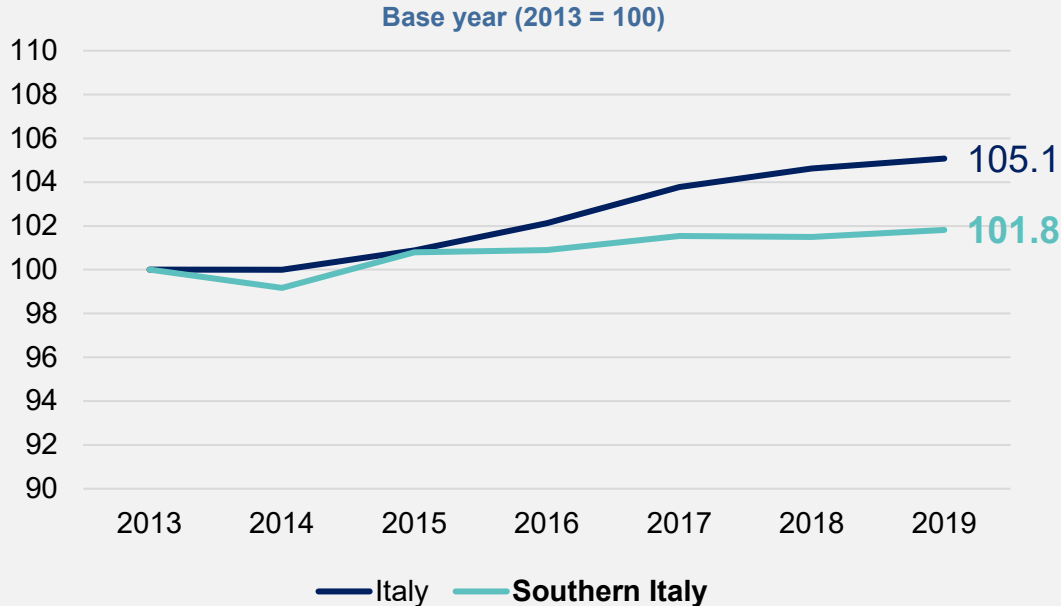
February 12<sup>th</sup>, 2026



# Dynamism and vitality of the Southern Italian economy: early signs of a structural ‘turning point’

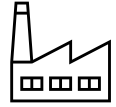
- In the period from 2019 to 2025, the “Mezzogiorno” has shown better trends (in terms of GDP) compared to the national average: **+8.6% versus +6.5%**.
- **A convergence process** that is gradually becoming structural. More than 2 percentage points have been recovered over the past six years.

### GDP Growth of Southern Italy vs Italy Before and After 2019



Source: SRM on Istat data

# Southern Italy pairs a robust industrial foundation with a significant level of international integration

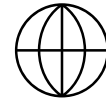


## Manufacturing companies



91,015 companies

Italy 359,928



## International



€60.4 billion in manufacturing export

Italy €593.5 billion



552,000 jobs

Italy 3,866,000



209 destination countries

Italy 228 countries



€41.5 billion GDP

Italy €331.6 billion



Trade balance +€14.2 billion

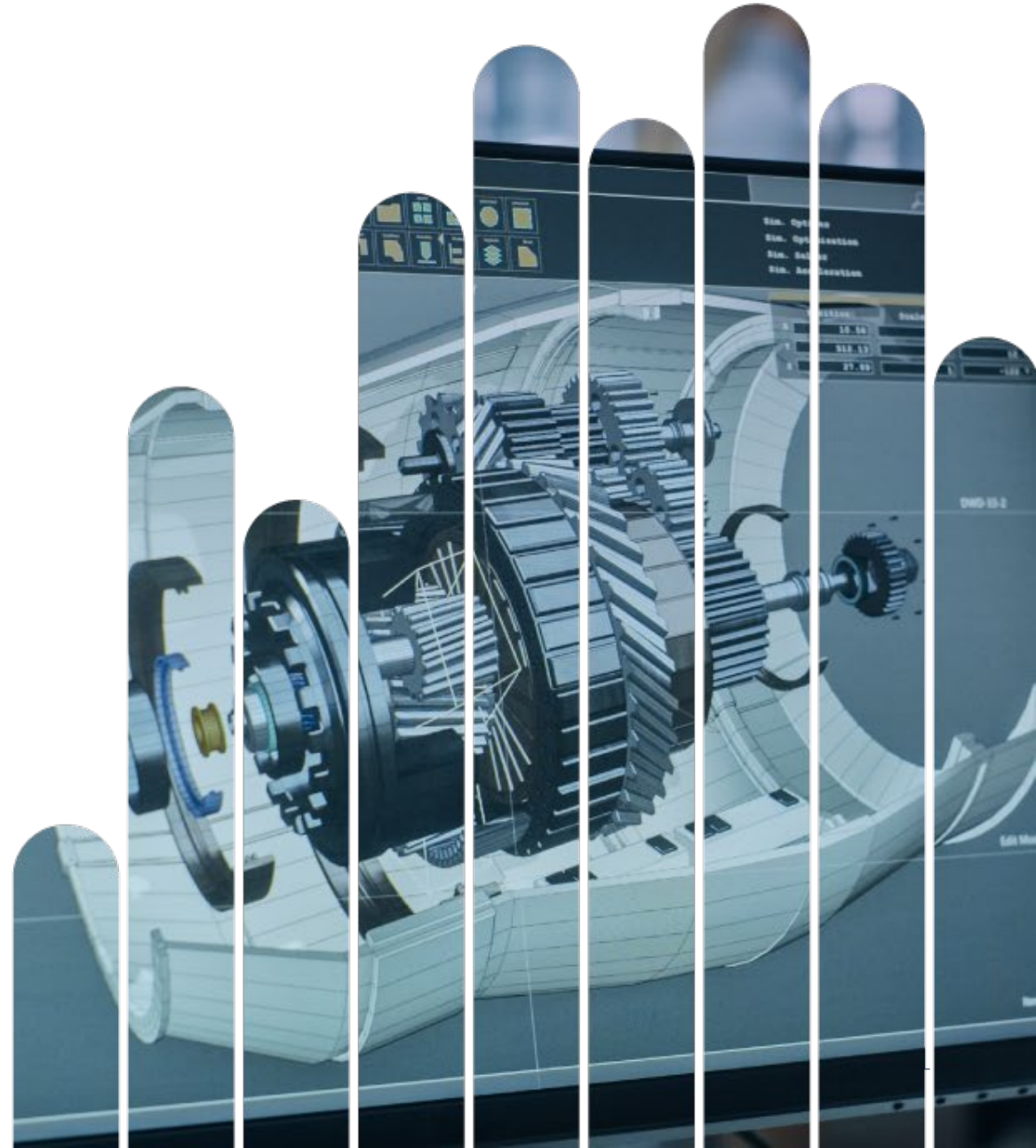
Italy +€120.6 billion

Source: SRM on Istat data



# Industrial supply chains: 4A+Pharma

Aerospace, Agrifood, Automotive,  
Apparel-Fashion and  
Pharmaceuticals are key drivers  
of the Southern Italian economy



# The 4A+Pharma sectors account for a significant share of manufacturing, underscoring Southern Italy's clear industrial specialization

## Companies



**34,556**

32% of the total in Italy and **38% of the total manufacturing companies** in the South of Italy.

## Jobs



Over **227,000** employees, 20% of the total in Italy and **41% of the manufacturing companies** in the area (in Italy they represent 29%).

## GDP



Over **€18 billion**, 18% of the national figure and **44% of the total manufacturing** of the area (Italy 31%).

## Export



€30 billion, **14% of Italy**. Positive trade balance: +€14.9 billion.

Source: SRM on Istat data

The 4A+Pharma industrial sectors are key drivers in the technological fields and boast strong cooperation and links with University clusters and the innovation ecosystem in Southern Italy.

# Tourism

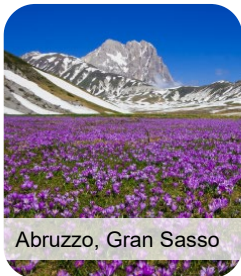
A key axis of growth:  
quality, internationalisation  
and competitiveness



# The “*Mezzogiorno*” is increasingly attractive, and has now become a top tourist destination

- In 2025, **93 million tourist nights** (20% of the total in Italy).
- **Significant growth in the international component** (+19% compared to 2019 – 32 million nights) highlighting the increasing attractiveness of the South of Italy.
- **Hotels and Restaurants turnover**: almost **€27 billion in 2025, 24% of Italy**.
- The **GDP generated by the tourism sector amounts to €24 billion, 5.6% of the total economy of the South**. Considering also the indirect and induced effect, the weight of tourism GDP accounts for 11% of the total economy.

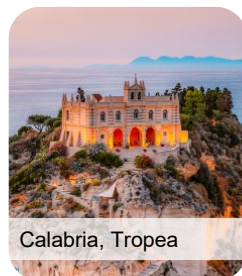
Source: SRM calculations on Istat and various



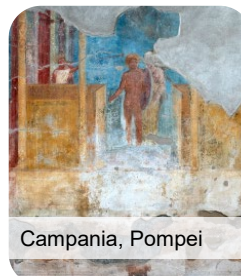
Abruzzo, Gran Sasso



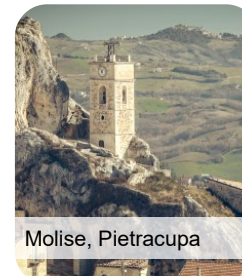
Basilicata, Matera



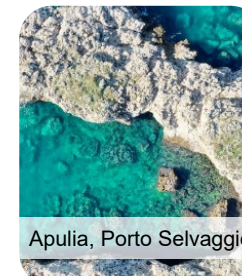
Calabria, Tropea



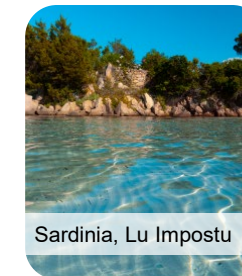
Campania, Pompei



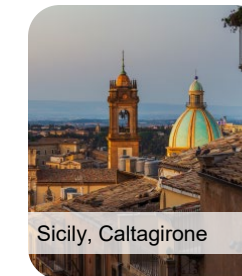
Molise, Pietracupa



Apulia, Porto Selvaggio



Sardinia, Lu Ipostu



Sicily, Caltagirone



Campania, Amalfi

## **Maritime economy**

Southern Italian ports:  
strategic and  
interconnection hubs for  
trade and business

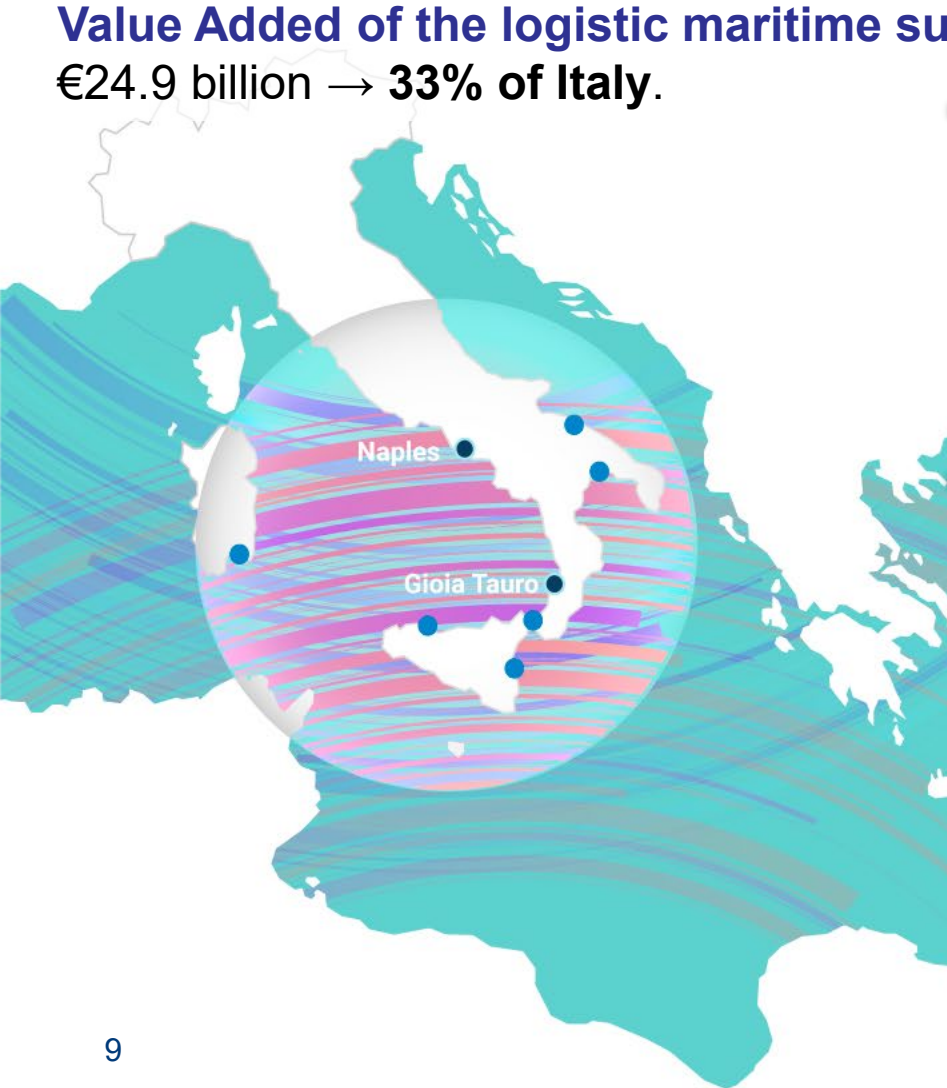


# Southern Italy also plays a key role in maritime transport, ports and logistics, supporting the local competitiveness

With 8 Port Authorities, Southern Italy is an important Euro-Mediterranean commercial hub.

## Value Added of the logistic maritime supply chain:

€24.9 billion → **33% of Italy.**



### Naples and Salerno ports: 650,000 TEUs

- They support the regional economy. The two ports are key drivers of the Region's manufacturing, with 32 million tonnes of goods handled through global maritime routes.
- Liner services of all major carriers with routes to the **USA, Middle East and India.**

### Gioia Tauro port: 4.5 mln TEUs

- **1<sup>st</sup> container port and 2<sup>nd</sup> automotive port** in Italy.
- **5<sup>th</sup> container port in the Mediterranean.**
- **Connected with 120 ports in the world**, 60 of which are in the Mediterranean.

Source: SRM on Assoport

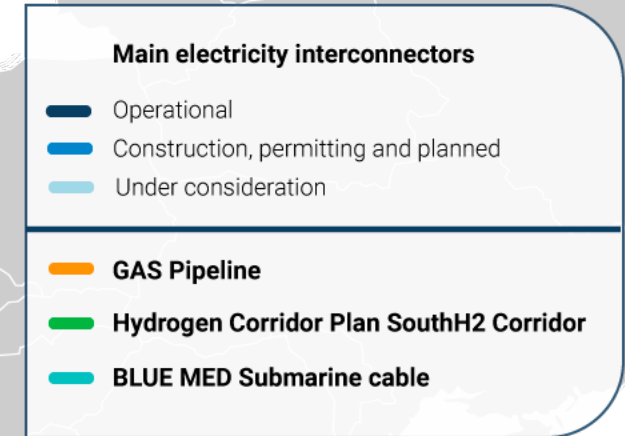
# Energy and green potential

Southern Italy is a strategic bridge for energy and digital flows



# Southern Italy at the heart of the Mediterranean: an energy hub, a gateway and a digital connector

- **The South of Italy** accounts for 54% of the total Italian production of renewables, including solar, wind and bio green energy (in GWh).
- **It is a gateway for energy flows** from North Africa and the Caspian, with terminals in Sicily and Puglia from which **77% of pipeline gas enters** Italy and also serves EU needs.
- South Italian **Ports are energy hubs** both for fossil and green energy.
- The large submarine electricity interconnection projects and the SouthH2 Corridor strengthen the **role of a bridge for energy** between Europe and the Mediterranean.
- **Central for digital connections: 30% of global submarine cables are located on the Mediterranean seabed.** Over 20 cables land in Sicily.



Source: SRM on various data

## Innovative ecosystem

The industrial system - supported by ports, logistics and energy infrastructures - can rely on a dynamic and competitive innovation ecosystem



# Size and importance of the innovation ecosystem in Southern Italy

## Business & Training

**Innovative companies** (*having specific characteristics of research and innovation*):

- Total number: 17,587 → **57% of the total number of companies** (national average of 58.6%) and 19% of the total in Italy.
- **Up by almost 23% in the** last ten years (Italy +8.4%).

**Educational offer in the South of Italy:**

- 24 universities with degree courses in STEM disciplines.
- Federico II of Naples is one of the oldest universities in the World (800 years)
- In 2024 over 23'000 graduates with a growing share in the 20-29 age group.

A clear example **of the Innovative ecosystem in Southern Italy** is the **Hub of San Giovanni a Teduccio in Naples**

- High synergy between the business sector, the University (Federico II) and applied research.
- There are 13 Academies present in the hub (including *Apple Developer Academy, Cisco Academy – DTLab Networking Bootcamp, PharmaTech Academy, Agritech Academy, Quantum Computing Academy and many others*) that offer highly relevant training programmes for the productive and innovative fabric in the area.

## Single SEZ

A powerful tool to support investment in Southern Italy



# Single SEZ: a benefit that works!

## The two main tools:

- The **One-Stop Authorisation** replaces up to 35 permits and approvals, reducing the average waiting time to about 30/45 days.
- The **SEZ tax credit** allows you to offset a portion of the investments against taxes due, reducing the overall cost of the investment

## The results are robust!

### One-Stop Authorisation

- Authorizations granted (2024-2025): **1,010**
- Investments already planned: **€6 billion**
- Average investment per company: **€6 million**
- Employment growth (2024-2025): **+18,000 jobs**

### Tax credit

- Credit applications (2024-2025): **17,500**
- Expected direct investments (2024): **€12.5 billion**
- Additional private investments activated (2024): **€7.2 billion**
- Average investment per company: **€718 thousand**

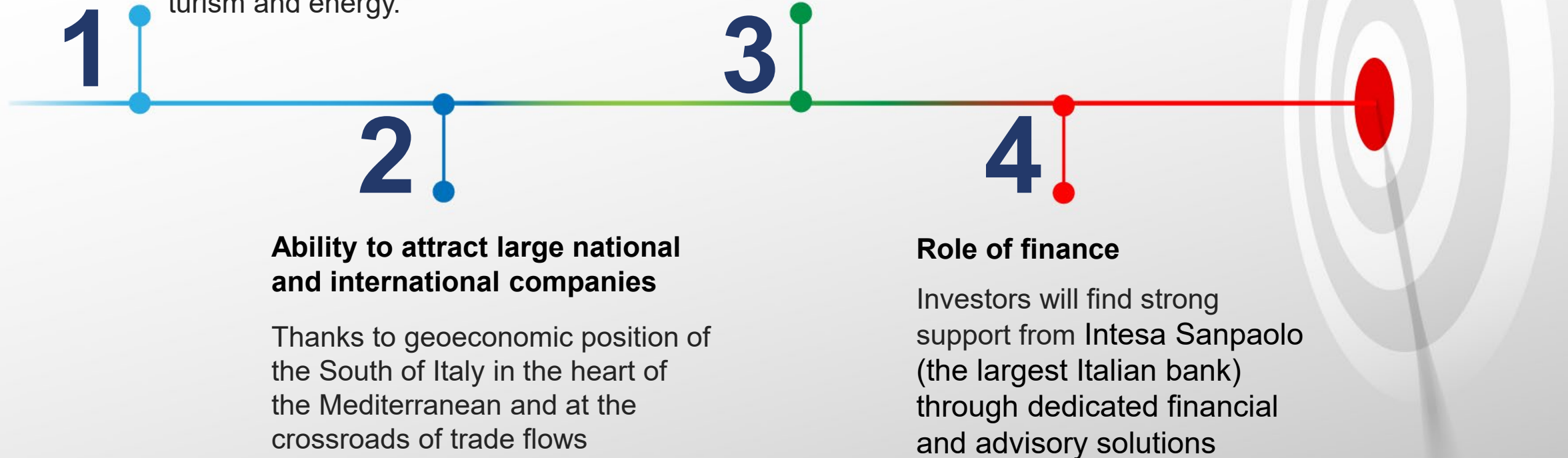
# What the single SEZ offers in terms of attractiveness of the territory

## Opportunities

Tax incentives and bureaucratic streamlining for local and international companies to invest in key manufacturing sectors plus tourism and energy.

## A positive ecosystem

Investors will find not a desertic green field, but a dynamic ecosystem for developing cooperation and partnerships with other companies and research centres





**Thank you for your attention**

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