

Ceresio Investors is advisor in the selling of Sifte Berti S.p.A. to the Swiss group Planzer, consolidating its role as a strategic bridge for investments between Italy and Switzerland

11 November 2024 | Ceresio Investors, through its Corporate Advisory & Investment Banking team led by Alessandro Santini, successfully assisted the Berti family, the historical owner of Sifte Berti S.p.A., in the sale of the company to **Planzer**, a leading Swiss family group in the transport and warehouse logistics sector.

Founded in 1969, **Sifte Berti S.p.A.** is one of Italy's leading national and international logistics companies, and this acquisition marks an important milestone in Planzer's growth strategy, thus consolidating its presence in Italy.

'It was an honour to accompany the Berti family on this new and important journey, with the certainty that the company's history and values will be carried forward in this new chapter of entrepreneurial history,' said **Alessandro Santini**, Executive Board Member and Head of Corporate Advisory & Investment Banking at Ceresio Investors.

The transaction reflects the positioning of **Ceresio Investors**, which can serve as a bridge for investments between Italy and Switzerland thanks to its in-depth knowledge of the Italian industrial market and the solidity and reputation that its Lugano office guarantees to Swiss interlocutors.

'This transaction perfectly underlines our expertise in connecting the two markets in which we operate as a Group, proposing ourselves as an advisor that can ensure an effective dialogue that generates value in complex transnational transactions such as this one,' explained **Gabriele Corte**, Executive Board Member of Ceresio Investors and Managing Director of Banca del Ceresio.

Ceresio Investors acted as Lead Financial Advisor and deal structuring for the seller family with the Corporate Advisory & Investment Banking team led by Alessandro Santini and composed by Pierfrancesco Ricciato, Giovanni Di Grandi, Vivia Marchi and Dario La Mantia.

Advisors of the transaction:

Studio Bolelli Sportelli de Pietri-Tonelli assisted the selling family by following the tax aspects of the transaction, with the help of Dr. Gianluca Bolelli, Dr. Paolo de Pietri Tonelli and Dr. Simone Catarinelli. The **law firm Conte Maienza e associati** assisted the seller family with the legal aspects. Baker McKenzie assisted Planzer with a team led by partner Paolo Ghiglione, assisted by associates Giacomo Lamperti and Anna Masut for the M&A aspects of the transaction, by counsel Mario Cigno and associate Amalia Scimè for the regulatory and environmental profiles, and by partner Serena Fantinelli and associate Nicolò Crespi for the labour law profiles. Leonardo De Luca (**De Luca Advisory**) acted as General Coordinator and Lead financial advisor & deal structuring for the buyer. **SCTS Studio Tributario e Societario** assisted the buyer for the tax profiles of the transaction with partner Antonio Zambon.

Ceresio Investors represents the Swiss banking group headed by Banca del Ceresio - specialised in asset management, securities custody, Corporate & Investment Banking and tax and wealth consolidation - founded in 1919 in Milan by Antonio Foglia. The third generation of the Foglia family is active today in Lugano through the parent company Banca del Ceresio and Lagom Family Advisors; in Milan through Ceresio SIM, Global Selection SGR and Eurofinleading Fiduciaria; in London with Belgrave Capital Management. Capital strength (simplified leverage ratio 38.9%), reputation in management (CHF 8.4 billion in assets under management) and the logic of co-investment between ownership and clients have always been its main distinguishing features (<http://www.ceresioinvestors.com>).

Sifte Berti S.p.A., a family-owned company, was founded in 1969 and specialises in national and international transport and integrated logistics solutions (including ADR goods), intermodal rail/road transport, air and sea freight forwarding and customs clearance. The company, which employs around 300 employees at seven locations in Italy (Lainate, Vercelli, Rome, Padua, Florence, Civitanova Marche and Caserta), offers tailor-made solutions in various fields, e.g. automotive, fashion and dangerous goods. 'Sifte Berti' has over 40 vehicles of its own and a storage area of 200 000 m², which it uses to provide comprehensive warehouse logistics services.

Planzer was founded in 1936 and has been a family-owned limited company since 1966. Today, the logistics company employs more than 6500 employees, of whom more than 400 are apprentices, and operates 72 locations in Switzerland, Italy, Liechtenstein, Germany, France and Hong Kong. With diversified services and all-round solutions it handles both private and business customers. A cornerstone upheld by the family-owned company is sustainability. More than 60 per cent of shipments, for example, travel a large part of the transport route using an environmentally friendly carrier such as rail.