

## **Italy Freight and Logistics Market - Growth, Trends, Covid-19 Impact, and Forecasts (2023 - 2028)**

Market Report | 2023-01-23 | 150 pages | Mordor Intelligence

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### **Report description:**

The Italy freight and logistics market is anticipated to register a CAGR of more than 4.5% over the forecast period.

#### Key Highlights

The COVID-19 pandemic wreaked havoc on Italy's maritime sector, slowing traffic at the country's ports and undermining trade connections with the rest of the world. Italy exempted its ports from lockdowns to maintain supply lines for essential medical supplies and food. Ships carried 70% of the country's total trade.

According to Maersk (Italy-based global freight forwarder), Italy exports over USD 142 billion in machinery and automotive exports, USD 48 billion in fashion exports, and USD 33 billion in pharmaceutical exports, successfully connecting eastern suppliers with European and western end consumers.

While the Vado Gateway offers opportunities for growth for Italy and Italian businesses, it serves far more than the Italian market. Northern Italy is one of the gateways to the so-called "Belt Road Initiative," connecting it to over 68 countries, 65% of the world's population, and 40% of the global GDP due to its proximity to both Suez and Gibraltar. The connection to East African, Indian, and Chinese maritime shipping hubs has the potential to accelerate economic growth not only in Italy, but throughout the region, by providing consumers and businesses with access to new markets.

According to the DPDgroup's "E-shoppers Barometer 2021," the e-commerce phenomenon continues to trend in all European countries, with Italy leading the way, with a +8% increase in the number of e-shoppers making their first purchase in 2021. Italy ranks seventh in Europe for the number of packages received, with 46% of regular e-shoppers making recurring purchases, accounting for 14.8% of all online purchases with an average of 42 annual transactions. However, expectations for delivery service improvement remain high, with 84% preferring it to be carried out directly to their home, but with three key options to ensure satisfaction: choice of day and time of delivery, advance knowledge of the time, and real-time information.

The strategic position of Italy, has been driving the freight and logisitcs market in the country. It has well structured infrastructure

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alongwith good governance and business policies which is propelling the market. Italy has a good network of roads, railways and seaways which is expected to act as a gateway for newer players to invest in the market. Furthermore, growth of e-commerce and cross-border trade is driving the market.

## Italy Freight & Logistics Market Trends

### Growth in E-commerce Sector

With a revenue of USD 26.3 billion in 2021, Italy is the 14th largest e-Commerce market, trailing only Brazil and ahead of Spain. With a growth of 17%, the Italian e-Commerce market contributed to a 15% global growth rate in 2021. Global e-commerce sales, like those in Italy, are expected to rise in the coming years. The growth rate of Italy is expected to match as same as the global average (6% per year) between 2021 and 2025

According to various industry associations, Italian e-commerce turnover in 2021 has reached 64.01 USD billion, a 33% increase year on year, thanks to more than 3 million new customers who joined the market in 2020 as a result of the lockdown. The average Italian e-shopper spends 1,608 euros per year, which has grown significantly. However, the majority of purchases are made from outside the country: 67% of users buy from foreign websites online, and the majority of them do so through marketplaces: 95% on Amazon, 46% on eBay, and 45% on Zalando.

In Italy, approximately 80% of the population uses the internet, which is lower than in the rest of Europe. However, e-commerce penetration is expected to rise in the coming years-more than half of Italians who use the internet (59%) shop online. According to the Europe E-commerce Report 2022, more than half of people have purchased something online at least once every three months.

### Increase in Cross-border Trade

There has been a rise in cross-border trade in Italy, especially due to its strategic location and infrastructure developed to ease the movement of goods domestically and internationally. This has been supported by the freight and logistics service providers in the country. It is expected that e-commerce and cross-border go hand in hand, and Italy's market will grow substantially over the forecast period.

Italy posted a trade deficit of 9.57 USD billion in August 2022, the largest on record, compared to a surplus of 1.02 USD billion in the same period the previous year, as rising energy prices and Italy's search for alternatives to Russia drove up imports. Imports increased by 59.1% to 50.32 USD billion, with purchases of energy increasing by 206.4% to 14.26 USD billion and consumer goods increasing by 38.4% to 12.74 USD billion. Meanwhile, exports increased at a slower rate of 24.8% to 40.75 USD billion, while sales increased (105.2%) to 2.4 USD billion. According to the National Institute of Statistics, Italy had a trade deficit of 1.81 USD billion within the European Union. As the dependence on import continues to grow, it is expected to bring more traction toward the freight and logistics market in Italy.

### Italy Freight & Logistics Market Competitor Analysis

The Italy freight and logistics market is fragmented in nature, with the presence of many international players as well as local players. Some of the existing major players in the market include - UPS, Saima Avandero (DSV), TNT, Deutsche Post DHL, Kuehne + Nagel, DB Schenker, Fercam, BRT, and Savino Del Bene. With a booming e-commerce market alongside a growing express and parcels market the logistics companies have the opportunity to enter the industry.

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