

Italy Cold Chain Logistics - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts 2019 - 2029

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Report description:

The Italy Cold Chain Logistics Market size is estimated at USD 8.76 billion in 2024, and is expected to reach USD 13.92 billion by 2029, growing at a CAGR of 9.73% during the forecast period (2024-2029).

Key Highlights

-The impact of COVID-19 was widely visible across all the logistics-dependent modes of transport worldwide. Although some industries struggled due to the pandemic, some were thriving, such as healthcare & pharmaceuticals, e-commerce, and the daily essentials goods industry, which were expected to affect the logistics industry positively during the COVID-19 outbreak globally. However, for the Italy cold chain logistics market, the year 2020 witnessed a decline in terms of revenue and growth, owing to the negative demand and supply outlook due to COVID-19 restrictions for end users, including manufacturers and suppliers of food & beverages, health & nutrition products, bakery, flower related products, and many others. The overall production activities of these industries declined, owing to operations with limited workforce capacity and inadequate health safety measures. This expected weak business performance directly impacted the overall sales of the system and service of cold chain logistics in European countries.

-The Italian freight and cold chain logistics market ranks high globally. Italy has the second-largest European domestic rail combined transport market in Europe after Germany. Italy has about 1.6 million twenty-foot equivalent units (TEU) and 12.3 million metric tons of combined transportation annually through rail and road transportation. COVID-19 had a positive impact on the Italian cold chain logistics. During the lockdown, the high demand for frozen food and pharmaceutical products helped grow the cold chain logistics market.

-After years of stagnation, the cold chain logistics industry is undergoing a reversal trend because of the country's positive rebound in exports and showing signs of growth again. The country has a highly developed and efficient transport and logistics network, especially in the northern and central regions, and has a vast domestic and international market due to its strategic

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position in central Europe. The cold chain market has enormous potential during the forecast period.

-Major industries in Italy include textiles and clothing, food and beverages, metals and metal products, chemicals, shipbuilding, pharmaceuticals, and medical equipment. The growing demand for organized retail and the increasing awareness of consumers to reduce food waste have driven the demand for cold chain logistics. With the advancement of new technologies, the use of cold chains in the food and beverage sector may help prevent the deterioration of food quality.

Italy Cold Chain Logistics Market Trends

Increasing Usage of Dairy Products in the Country is Driving the Market

Milk production in the European Union is estimated at around 155 million tons annually. Germany, France, Poland, the Netherlands, Italy, and Ireland are the main producing countries. Together, they account for almost 70% of the EU's milk production. Italy is one of the leading players in the world dairy industry; the national show combines quality, volumes, and tradition. The most advanced milk processing technologies have made it a favorite drink (fresh, UHT, LSL), compatible with special diets, and accessible to customers suffering from intolerances.

The dairy sector is the first Italian food division, with a turnover of 14.2 billion euros. 75% of the milk is produced in the northern Italian districts: Lombardia, Emilia Romagna, Veneto, and Piemonte. In Italy, 11 million tons of milk are made, and 13 million tons of milk are converted into one million tons of cheeses (more than 440,000 tons are DOP cheeses), almost three million tons of pasteurized drinking milk (1,300,000 Tn) and UHT milk (1,600,000 Tn) and 190,000 Tn of yogurts and fermented milk.

Italian milk production in 2021 increased to 13 million tons (+3% compared to 2020). Thanks to the self-sufficiency achieved by the sector, imports from abroad decreased (imports of bulk milk registered a decrease of 30%). In a report for the Italian association of farmers and breeders Alleanza Cooperative Agroalimentari, cow's milk production in Italy is expected to increase by +10/+15% in the next five years, with an average annual variation rate of +2/+3%, which is intended to continue until 2030. Italian production of dairy products will reach Euro 21.5 billion in 2026 from Euro 20.39 billion (1 Euro=1.06 USD) in 2021, with an average year-over-year growth of 0.8%. Since 2013, the Italian offer has increased by 2.6% year-over-year. Dairy product consumption is projected to reach 11,043,000,000 kilograms by 2026 from 11,000,000,000 kilograms in 2020, with an average annual growth of 0.1%.

Over 17 thousand tons of packed milk were imported by Lybia from Italy by the end of 2021. Albania and Malta were ranked second and third as top importing countries, with approximately 4.5 and 4.2 thousand tons of packed milk, respectively. The above factors all increase the cold chain logistics market in Italy.

Increasing Investments in the Logistics Sector is Driving The Market

The logistics sector confirms its positive trend in 2022, proving to be one of the emerging sectors attracting investors appetite. In terms of capital markets volumes, logistics hit a new record high, reaching in Q1-Q3 2022 the highest number of investments ever recorded, totaling almost Euro 2.7 bn (+53% YoY). Moreover, several lands and development projects were transacted in the market: investors with a long-standing presence and major European and global property companies are looking at Italy as a high-potential new European logistics destination. In terms of several deals, 51 operations were recorded in the market, characterized by a remarkable average deal size (Euro 53 million). Single asset deals dominated the market, although the largest deal was a Prologis'investors' acquisition of pan-European Urban logistics platform Crossbay for approximately Euro 1.6bn, with the Italian share being a very large one. The rising importance of international investors has facilitated market liquidity conditions by pushing yields downwards for many years. Still, since Q2 2022, yields have started to soften, reflecting wider macroeconomic uncertainty and increases in financing costs.

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Italy Cold Chain Logistics Industry Overview

The Italian cold chain logistics market is fragmented, with several domestic and international companies present in the market studied. The market is experiencing collaborations and new entries of companies to set up their firm foot. The demand for cold chain facilities has led to many small players with a low degree of specialization, leading to problems like high operating costs and unbalanced and insufficient development. Some existing major players in the market include Safim Logistics, Frigocaserta SRL, Eurofrigo Vernate SRL, Frigoscandia SPA, and DRS Depositi Regionali Surgelati SRL.

Additional Benefits:

- The market estimate (ME) sheet in Excel format
- 3 months of analyst support

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