# Italy Freight and Logistics - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts 2017 - 2029

Market Report | 2024-02-17 | 312 pages | Mordor Intelligence

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**Report description:**

The Italy Freight and Logistics Market size is estimated at USD 178.52 billion in 2024, and is expected to reach USD 215.12 billion by 2029, growing at a CAGR of 3.80% during the forecast period (2024-2029).

Rising trade, employment opportunities and investment values driving freight transport demand in the country

- After years of stagnation, the logistics sector is experiencing a reversal trend and is picking up signs of growth again due to a positive recovery in the country's exports. The country has a highly developed and efficient network, particularly in the Northern and Central regions and extensive domestic and international markets due to its strategic position in the center of Europe. The value of an investment in Italy's industrial and logistics real estate market has fluctuated since 2013. In 2021, investment volumes peaked at USD 2.70 billion, outperforming the office sector.
- After the COVID-19 pandemic and the halt in economic activities, the market started recovering when the restrictions for the movement of goods were eased in 2021. The volume of solid goods transported within or across Italy grew annually at 4.77%, whereas liquid goods expanded substantially by 6.95% in 2021. Also, with the acceleration of trade in the country, the road freight transport market sealed a growth of 5.25% in 2021, as these industries are strongly correlated. Total imports and exports of Italy increased by 29.41% YoY and 22.59% YoY, respectively, in 2021.
- Italy's logistics sector accounted for most of the transport workforce in 2019. That year, almost 357,700 people were employed in the warehousing and support activities sector, while road freight transport employed 352,600 workers. Postal and courier activities employed 144,300 workers.

## Italy Freight and Logistics Market Trends

### Mobility and logistics investments soar to USD 298.25 billion for an integrated national transport system and climate-responsive infrastructure

- In 2022, the conflict in Ukraine led to a significant drop in freight train traffic between China and Europe, with Italy experiencing a particularly dramatic collapse in transport volume, down by 91.62% compared to 2021, despite the introduction of the new Wuhan-Milan route. On the other hand, Hungary was a notable exception, as it saw a substantial 1,266% increase in cargo volume despite being a secondary player in this transport route. The decline in transportation demand is the main cause of the progressive decline in maritime freight rates for container shipments.
- In 2022, the Document of Economy and Finance's (DEF's) Infrastructure, Mobility, and Logistics Annex presented a comprehensive framework outlining plans, reforms, and investments charted and scheduled for the upcoming decade. It allocated nearly EUR 300 billion (USD 320.24 billion) to selected initiatives aligned with strategic plans considering the government's economic strategy and the Sustainable Development Goals.
- The mobility and logistics infrastructure projects listed in the Document of Economy and Finance (DEF) in 2022 were valued at a total of EUR 279.4 billion (USD 298.25 billion), showcasing an increase of 8.1%. This funding was targeted for the Integrated National Transport System's completion and safety, as well as in light of the climate crisis and technological advancement. These expenditures included USD 94.55 billion for roads and highways, USD 166.91 billion for railways and urban nodes, USD 11.43 billion for ports, USD 3.62 billion for airports, USD 36.91 billion for rapid mass transit in major cities, and USD 11.43 billion for cycle paths.

### Fuel prices surged in Italy after discount on fuel-related excise duties expired at the end of 2022

- Fuel prices in Italy have continued to rise, with petrol and diesel breaking the record. Petrol reached USD 2.16 per liter, and diesel reached EUR 2.14/liter (USD 2.27/liter) in March 2022. The average price charged on petrol in self-service mode was EUR 1.862/liter (USD 1.98/liter), with the various brands ranging between EUR 1.855 (USD 1.97 /liter) and EUR 1.874/liter (1.99 USD/liter), and the restoration of excise duties was in effect until March 21, 2022 (+30.5 cents/liter on petrol and diesel and +10.4 cents/liter on LPG). The price of oil has increased to more than USD 100 per barrel. Prices surged mainly due to the speculations deriving from international tensions and after the Russian invasion of Ukraine.
- In the first half of 2021, the price of gas rose sharply. This phenomenon affected many countries where the energy demand increased dramatically due to the global energy crisis and the fast post-lockdown economic recovery. The average Italian household's gas supply price increased by 64.8% in 2022 compared to the previous year due to the impact of the Ukraine conflict on family finances.
- Higher fuel prices were a key driver that led to inflation in Italy. Inflation levels in the European Union and Italy peaked in late 2022 and have gradually decreased, but energy prices are rising again. In the initial days of 2023, national prices for full-service petrol stood at EUR 1.95 (USD 2.08) per liter and EUR 2.02 (USD 2.15) for diesel. The increase was largely due to the expiration of the discount on fuel excise tax, which was put in place in March 2022 to help combat a surge in fuel prices. The discount initially expired on December 1 and was extended at a lower rate until the end of 2022, when it expired.

Italy Freight and Logistics Industry Overview

The Italy Freight and Logistics Market is fragmented, with the top five companies occupying 4.57%. The major players in this market are DB Schenker, Deutsche Post DHL Group, DSV A/S (De Sammensluttede Vognmnd af Air and Sea), Fercam and Kuehne + Nagel (sorted alphabetically).

Additional Benefits:

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

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