

Italy Cold Chain Logistics - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)

Market Report | 2025-04-28 | 150 pages | Mordor Intelligence

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Report description:

The Italy Cold Chain Logistics Market size is estimated at USD 9.61 billion in 2025, and is expected to reach USD 15.29 billion by 2030, at a CAGR of 9.73% during the forecast period (2025-2030).

Key Highlights

- Italy has established itself as a global frontrunner in freight and cold chain logistics. Following Germany, Italy ranks as Europe's second-largest market for combined domestic rail transport. Each year, Italy's rail and road networks manage around 1.6 million twenty-foot equivalent units (TEU) and 12.3 million metric tons.
- Italy's burgeoning e-commerce landscape is fueling a rise in online grocery shopping. A recent analysis revealed that in 2024, Italy's food and grocery market, valued at EUR 75.5 billion (USD 79.57 billion), saw online sales accounting for 6% of the total, equating to EUR 4.6 billion (USD 4.85 billion). Online sales surged by 6.2% from the previous year, outpacing the 1.5% growth in brick-and-mortar stores. Sources emphasize that food purchases are at the forefront of Italy's online shopping trends. Key consumer drivers include conveniences such as affordable delivery, efficient shipping, and a seamless purchasing experience.
- Italian online grocery shoppers demonstrate notable loyalty, with repeat purchases exceeding 70%. While personal care and beauty account for 9% of Italy's digital retail market, food and beverage hold a 6% share. 'Near Food' items, which include household and hygiene products, show a 3% online penetration, aligning with broader European patterns. In 2024, 27.1% of Italian shoppers utilized online platforms for food purchases, an 8.8% increase from the previous year. Additionally, 21% of Italians intend to boost their food spending in 2024, emphasizing a preference for healthier options.
- In conclusion, Italy's logistics and e-commerce sectors are experiencing significant growth, driven by advancements in transportation and a shift towards online grocery shopping and cold chain logistics market.

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

Italy stands as a pivotal player in the global dairy industry, seamlessly blending quality, volume, and tradition in its national production. Cutting-edge milk processing technologies have popularized milk in various forms - fresh, UHT, and LSL - catering to special diets and those with intolerances.

Italy's rich cheese-making heritage is underscored by 37 PDO cheeses and a plethora of local varieties. Here, traditional practices have evolved into industrial processes, coexisting with cheeses crafted through modern techniques. This results in a diverse array of cheeses tailored to meet the discerning tastes of both domestic and international consumers.

Yogurt and fermented milk products boast a vast array of flavors, sizes, and characteristics, making them versatile for various consumption occasions. Beyond traditional offerings, probiotic fermented milk caters to the contemporary health-conscious market. Dominating the Italian food landscape, the dairy sector boasts sales of EUR 14.2 billion (USD 14.96 bn). Notably, 75% of Italy's milk production hails from the northern regions: Lombardia, Emilia Romagna, Veneto, and Piemonte.

Italy produces 11 million tons of milk, converting it into 1 million tons of cheese (with over 440,000 tons being PDO), nearly 3 million tons of pasteurized drinking milk, and 190,000 tons of yogurt and fermented products. The cheese production includes 1.3 million tons of pasteurized milk and 1.6 million tons of UHT milk. Italy's cheese exports, valued at EUR1.4 billion, amount to nearly 250,000 tons. The leading exported varieties include Mozzarella and other fresh cheeses (36.4%), Grana Padano PDO and Parmigiano Reggiano PDO (25%), followed by Pecorino Romano PDO, Gorgonzola PDO, and Provolone. In a report carried out for the Italian association of farmers and breeders Alleanza Cooperativa 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.

The report also includes estimates of the national production of cow's milk: Italy will reach theoretical self-sufficiency in the raw material in a few years (today it is 80%). In the last five years, the production of cow's milk in Italy has increased significantly. Most of the increase in production took place in the northern Italian regions (Lombardy +19%, Emilia Romagna +15%, Veneto +6.0%, Piedmont +15%), but also in some southern regions (Puglia +12%, Sicily and Basilicata) +11%, Calabria +17%). The increasing usage of dairy products in the country is driving the cold chain logistics market.

Expanding Cold Storage Facilities in Italy is Driving the Market

Cold storage facilities are crucial for preserving perishable goods like fruits, vegetables, and seafood. In response to its agricultural industry's needs, Italy, benefiting from a temperate climate, has witnessed a surge in cold storage facilities. Due to advancements in refrigeration and logistics technologies, these facilities have become more efficient, bolstering Italy's agricultural exports. For instance, in September 2024, NewCold, a global frontrunner in advanced food logistics, broke ground on Central and Southern Italy's largest temperature-controlled warehouse. Located in Ferentino, Frosinone, this EUR 70 million (USD 73.77 mn) project is poised to create 150 to 200 jobs and commence operations by 2026. Strategically situated next to Froneri's Ferentino plant, the facility aims to streamline frozen product storage, offering notable environmental advantages and bolstering Froneri's expansion. Froneri stands out as the globe's second-largest packaged ice cream entity and a prominent private-label ice cream manufacturer.

The facility's inaugural phase will see it rise to 40 meters (130 feet) with a capacity of 62,000 pallet spaces. Notably, this state-of-the-art warehouse is engineered to consume 50% less energy than its conventional counterparts, harnessing renewable energy and automation. Features include automated vehicle loading/unloading and a fully automated picking system. Expanding

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its Italian footprint, NewCold's Ferentino warehouse will complement its existing facilities in Piacenza and Borgorose. Once all phases are realized, NewCold's Italian capacity will soar to 200,000 pallet positions. In conclusion, the development of advanced cold storage facilities in Italy not only supports the agricultural sector but also contributes significantly to the economic growth and environmental sustainability.

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

Table of Contents:

1 INTRODUCTION

- 1.1 Study Deliverables
- 1.2 Study Assumptions
- 1.3 Scope of the Study

2 RESEARCH METHODOLOGY

- 2.1 Analysis Methodology
- 2.2 Research Phases

3 EXECUTIVE SUMMARY

4 MARKET DYNAMICS AND INSIGHTS

- 4.1 Current Market Scenario
- 4.2 Market Dynamics
 - 4.2.1 Drivers
 - 4.2.1.1 Rise in Ecommerce
 - 4.2.1.2 Increase in Demand for Persiable Products
 - 4.2.2 Restraints
 - 4.2.2.1 Shortage of Drivers
 - 4.2.2.2 Increasing Energy and Fuel Costs
 - 4.2.3 Opportunities
 - 4.2.3.1 Automated Warehouses
- 4.3 Industry Attractiveness - Porter's Five Forces Analysis
 - 4.3.1 Threat of New Entrants
 - 4.3.2 Bargaining Power of Buyers/Consumers
 - 4.3.3 Bargaining Power of Suppliers
 - 4.3.4 Threat of Substitute Products
 - 4.3.5 Intensity of Competitive Rivalry

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- 4.4 Technological Trends and Automation
- 4.5 Government Regulations and Initiatives
- 4.6 Industry Value Chain/Supply Chain Analysis
- 4.7 Spotlight on Ambient/Temperature-controlled Storage
- 4.8 Impact of Emission Standards and Regulations on Cold Chain Industry
- 4.9 Effect of Geopolitical Events on the Market

5 MARKET SEGMENTATION

- 5.1 By Services
 - 5.1.1 Storage
 - 5.1.2 Transportation
 - 5.1.3 Value-added Services (Blast Freezing, Labeling, Inventory Management, etc.)
- 5.2 By Temperature Type
 - 5.2.1 Ambient
 - 5.2.2 Chilled
 - 5.2.3 Frozen
- 5.3 By Application
 - 5.3.1 Horticulture (Fresh Fruits and Vegetables)
 - 5.3.2 Dairy Products (Milk, Ice-cream, Butter, etc.)
 - 5.3.3 Meats and Fish
 - 5.3.4 Processed Food Products
 - 5.3.5 Pharma, Life Sciences, and Chemicals
 - 5.3.6 Other Applications

6 COMPETITIVE LANDSCAPE

- 6.1 Market Concentration Overview
- 6.2 Company Profiles
 - 6.2.1 Safim Logistics
 - 6.2.2 Frigocaserta SRL
 - 6.2.3 Eurofrigo Vernate SRL
 - 6.2.4 Frigoscandia SPA
 - 6.2.5 DRS Depositi Regionali Surgelati SRL
 - 6.2.6 Frigogel SRL
 - 6.2.7 Soluzioni Logistiche Freddo SRL In Breve SL Freddo SRL
 - 6.2.8 Sodele Magazzini Generali Frigoriferi SRL
 - 6.2.9 Horigel SRL
 - 6.2.10 Fridocks General Warehouses and Frigoriferi SRL
 - 6.2.11 Lineage Logistics
 - 6.2.12 UPS*
- 6.3 Other Companies

7 FUTURE OUTLOOK OF THE MARKET

8 APPENDIX

- 8.1 Macroeconomic Indicators (GDP Distribution, by Activity, Contribution of Transport, and Storage Sector to economy)
- 8.2 External Trade Statistics - Exports and Imports, by Product

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