

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

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Report description:

The Italy Freight and Logistics Market size is estimated at 117.6 billion USD in 2025, and is expected to reach 140.9 billion USD by 2030, growing at a CAGR of 3.67% during the forecast period (2025-2030).

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

- By December 2023, Italy's port of Ancona is slated for a significant upgrade with the completion of a new EUR 108 million (USD 115.28 million) transportation link. The project, awarded to a joint venture between BESIX and Donati, encompasses a 3.3 km road commissioned by Anas, an Italian road firm. This road, featuring two tunnels and a viaduct, is expected to take three years to finish. Once operational, it will connect the international port of Ancona to the Strada Statale 16 Adriatica at the Torrette roundabout.
- The European Union's strategy to achieve climate neutrality by 2050 places a strong emphasis on a modal shift to rail, with cross-border transport playing a pivotal role in realizing the EU's Green Deal objectives. However, rail transport in Italy faces challenges, including missing links and various barriers that hinder its competitiveness. Despite these hurdles, Italy's rail sector holds a 10% modal split. Notably, companies like FS Group have ambitious investment plans, earmarking EUR 160 billion (USD 170.79 billion) for infrastructure and EUR 190 billion (USD 202.82 billion) for overland transport by 2030.

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Growing future prospects due to planned overhaul of superheavy cargo transport fleet by 2026 in Italy

- In July 2024, the Italian Ministry of Transport greenlit a project to establish a rail freight station in Piacenza, strategically placed between Milan and Bologna. The upcoming station will be situated in the eastern part of Piacenza, specifically in the Le Mose area. Moreover, Le Mose already hosts the Piacenza Intermodal Terminal, overseen by Hupac. This existing terminal is currently undergoing significant enhancements, with completion slated for late 2024 or early 2025. These developments paint a promising future for Piacenza's rail freight prospects.
- In 2024, Italy plans to upgrade its superheavy cargo transport fleet due to poor conditions and failure to meet EU standards. Shippers and carriers are urging the government to implement a public incentive plan amid challenges from the Russian-Ukrainian conflict and stricter EU regulations. The plan requires a USD 747.24 million investment by 2026 to phase out 25-30% of the oldest, most polluting, and least safe vehicles over three years. Italy's support for the freight sector has lagged behind France and Germany, but changes are expected as early as late 2024.

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

- For the last three years, Italy has consistently held the record for the highest average wholesale power prices among major European markets. This is primarily due to its heavy reliance on natural gas for electricity generation, a strategy that sets it apart from its European counterparts. In 2023, Italy's wholesale power prices stood at an average of USD 137.80 per megawatt hour, a figure that was a third higher than both Germany's and France's averages, and over 50% more than Spain's. Moving into 2024, Italy's power costs have continued to surge, with recent wholesale prices sitting nearly 40% above France's and a striking 60% higher than Spain's.
- As of March 2024, Italy's power and gas regulator, Arera, has increased the maximum payments in capacity auctions for 2025-2027 to USD 86,466.7/MW for new capacity. Previous auctions for 2022-2024 offered maximum payments of USD 74,724.3/MW for new capacity and USD 35,227.2/MW for existing capacity, payable over 15 years. In coming years, Italian power demand will rise due to increased electrification from electric vehicles, heat pumps, and electrolyzers.

Italy Freight and Logistics Industry Overview

The Italy Freight and Logistics Market is fragmented, with the major five players in this market being DHL Group, DSV A/S (De Sammensluttede Vognmand af Air and Sea), FedEx, Kuehne+Nagel and Savino Del Bene SpA (sorted alphabetically).

Additional Benefits:

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

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