

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

Market Report | 2025-04-28 | 249 pages | Mordor Intelligence

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Report description:

The Italy Road Freight Transport Market size is estimated at 39.83 billion USD in 2025, and is expected to reach 47.38 billion USD by 2030, growing at a CAGR of 3.53% during the forecast period (2025-2030).

Manufacturing exports in Italy experienced a YoY growth of 17.9% in 2022 and drove the demand for road freight services

- Italy is the second-largest manufacturing country in Europe. In 2023, revenues of Italian manufacturing companies are estimated to reach a record USD 1.23 billion, USD 266.87 million more than in 2019. Moreover, in 2022, manufacturing exports in Italy experienced a YoY growth of 17.9% and reached USD 568 billion. As Italy saw an increase in exports of manufactured goods, the demand for road freight services also increased to transport these goods to international markets and ports for shipment. Italy's export growth is higher than Germany's and France's in all manufacturing sectors except clothing and leather.
- The e-commerce sector in Italy is anticipated to grow and register a CAGR of 11.59% during 2023-2027. The rise in e-commerce is expected to drive the growth of the wholesale and retail trade end-user segment. Moreover, rising construction activities in Italy are expected to support the construction end-user segment. The medium- to long-term growth of the construction sector in Italy remains intact despite near-term challenges in certain construction sectors. Government-funded construction projects are expected to support the sector in Italy.

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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 Road Freight Transport Industry Overview

The Italy Road Freight Transport Market is fragmented, with the major five players in this market being Arcese Trasporti SpA, DACHSER, Deutsche Bahn AG (including DB Schenker), DSV A/S (De Sammensluttede Vognmænd af Air and Sea) and La Poste Group (including BRT) (sorted alphabetically).

Additional Benefits:

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

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