

Italy Freight And Logistics - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2026 - 2031)

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Report description:

Italy Freight And Logistics Market Analysis

Italy freight and logistics market size in 2026 is estimated at USD 121.88 billion, growing from 2025 value of USD 117.61 billion with 2031 projections showing USD 145.64 billion, growing at 3.63% CAGR over 2026-2031. Investment tied to the National Recovery and Resilience Plan (NRRP) is expanding port and rail capacity, while e-commerce demand accelerates parcel volumes that challenge traditional long-haul networks. The Italy freight and logistics market benefits from the country's gateway role between Europe and the Mediterranean, yet labor shortages and an aging vehicle fleet raise cost pressures. Rising cold-chain needs from pharmaceutical and premium food exports stimulate temperature-controlled warehousing, and automation incentives under Industry 4.0 support modernization in northern hubs. Consolidation activities, such as DACHSER acquiring 80% of Fercam Italia, highlight a shift toward larger, integrated providers capable of handling complex multimodal flows.

Italy Freight And Logistics Market Trends and Insights

E-Commerce Parcel Surge and Last-Mile Investments

Domestic parcels within CEP captured a 66.54% share in 2024, reflecting surging online retail that hit EUR 58.8 billion (USD 64.9 billion) and grew 6% year over year. The Italy freight and logistics market responds by adding dense locker grids; the DHL-Poste Italiane venture targets 10,000 automated pickup points and cuts per-parcel urban delivery cost by 30%. Amazon Logistics extended same-day coverage to 15 more cities, compelling traditional carriers to invest in micro-fulfillment and electric fleets.

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Carriers reengineer hub-and-spoke layouts to support sub-100-kilogram shipments that dominate e-commerce flows. Urban policy incentives for zero-emission vehicles align with operator fleet renewal strategies. Capacity challenges persist on peak shopping days, driving collaboration with crowd-shipping platforms to absorb overflow volumes.

Cold-Chain Demand from Food and Pharma Exports

Medicinal drugs sustained above 80% of the pharmaceutical export value in 2024, anchoring demand for temperature-controlled distribution. UPS acquired Frigo-Trans and BPL, bolstering European GDP-grade cold-chain coverage and positioning Milan's pharma cluster as a hub for emerging-market shipments. Temperature-controlled warehousing claims only 7.81% of total capacity in 2024, yet it is expected to expand at a 3.53% CAGR (2025-2030) as vaccine logistics and biologics production widen demand. Airport cargo zones in Milan, Rome, and Bologna add cool-room space to capture biotech flows. Regional specialization enables operators to capture value via end-to-end validated lanes with active packaging. Energy-efficient refrigeration systems benefit from NRRP grants earmarked for sustainable logistics facilities.

Driver Shortages and Aging Truck Fleet

Only 2.2% of professional drivers in Italy are under 25, creating succession risk as veteran operators retire. The average heavy-duty vehicle age of 19.1 years exceeds the EU average and lowers fleet reliability, inflating maintenance costs. Protests in Rome during 2024 spotlighted declining service quality and urged fast-track license recognition for foreign drivers. Grant programs cover up to EUR 24,000 (USD 26,487) per driver for training, yet uptake lags amid cumbersome application rules. Leasing firms promote flexible pay-per-kilometer schemes to accelerate fleet renewal, but capital constraints persist among micro-fleets dominating the Italy freight and logistics market.

Other drivers and restraints analyzed in the detailed report include:

Infrastructure Upgrades Under NRRP and TEN-T Corridors
Industry 4.0 Tax Credits Boosting Smart-Logistics Tech
High North-South Operating-Cost Differential

For complete list of drivers and restraints, kindly check the Table Of Contents.

Segment Analysis

Manufacturing accounted for 31.12% of 2025 revenue, anchored in automotive, machinery, and life-science production hubs across Lombardy, Piedmont, and Emilia-Romagna. Component flows require synchronized just-in-sequence deliveries, fostering collaboration between hauliers and tier-one suppliers. Wholesale and retail trade grows fastest at 3.86% CAGR (2026-2031) as omnichannel brands demand nationwide next-day fulfillment. Construction logistics gains from NRRP works, shipping aggregates, steel, and prefabricated modules to rail and highway sites.

Energy transition policies taper investments in oil and gas haulage, nudging carriers toward renewables project cargo. Agriculture, fishing, and forestry strengthen export footprints in premium olive oil and wine, raising cold-chain and reefer container needs. Emerging sectors such as renewable technology assembly and digital services diversify the Italy freight and logistics market's customer base, cushioning cyclical risk.

Freight transport generated 62.88% of 2025 revenue, underscoring the centrality of road, rail, sea, and air moves in the Italy freight and logistics market. The segment captures flows from industrial clusters in the North to consumer markets nationwide. CEP services record a 4.17% CAGR between 2026-2031 as online shopping resets delivery frequency benchmarks and accelerates network densification. Warehousing and storage rides Industry 4.0 incentives to add multi-level automation in northern facilities,

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lifting throughput and assuring scalability. Freight forwarding leverages Italy's positioning on Asia-Europe lanes to orchestrate multimodal movements, while other services encompass project cargo orchestration and hazardous goods handling.

Integrated offerings now blur function lines as carriers embed customs brokerage and inventory control within transport contracts. Diversification is visible in Poste Italiane's pivot: revenue from logistics operations outpaced mail services in 2025, validating service expansion. Cross-selling boosts stickiness with industrial clients demanding door-to-door visibility and compliance. The Italy freight and logistics market rewards operators that fuse transport, warehousing, and value-added services under unified digital platforms.

The Italy Freight and Logistics Market Report is Segmented by End User Industry (Agriculture, Fishing, and Forestry, Construction, Manufacturing, Oil and Gas, Mining and Quarrying, Wholesale and Retail Trade, and Others) and by Logistics Function (Courier, Express, and Parcel (CEP), Freight Forwarding, Freight Transport, Warehousing and Storage, and Other Services). The Market Forecasts are Provided in Terms of Value (USD).

List of Companies Covered in this Report:

Amazon Arcese Trasporti SpA BRT SpA CMA CGM Group (Including CEVA Logistics) DHL Group DSV A/S (Including DB Schenker) FedEx Fercam SpA International Distributions Services PLC (Including GLS) Grimaldi Group GRUBER Logistics SpA Italsempione Italtrans Kuehne+Nagel Mercitalia Rail MSC Mediterranean Shipping Company S.A.A Poste Italiane Savino Del Bene SpA Transmec Group United Parcel Service of America, Inc. (UPS)

Additional Benefits:

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

Table of Contents:

- 1 Introduction
 - 1.1 Study Assumptions and Market Definition
 - 1.2 Scope of the Study
- 2 Research Methodology
- 3 Executive Summary
- 4 Market Landscape
 - 4.1 Market Overview
 - 4.2 Demographics
 - 4.3 GDP Distribution by Economic Activity
 - 4.4 GDP Growth by Economic Activity
 - 4.5 Inflation
 - 4.6 Economic Performance and Profile
 - 4.6.1 Trends in E-Commerce Industry
 - 4.6.2 Trends in Manufacturing Industry
 - 4.7 Transport and Storage Sector GDP
 - 4.8 Export Trends
 - 4.9 Import Trends

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- 4.10 Fuel Price
- 4.11 Trucking Operational Costs
- 4.12 Trucking Fleet Size by Type
- 4.13 Major Truck Suppliers
- 4.14 Logistics Performance
- 4.15 Modal Share
- 4.16 Maritime Fleet Load Carrying Capacity
- 4.17 Liner Shipping Connectivity
- 4.18 Port Calls and Performance
- 4.19 Freight Pricing Trends
- 4.20 Freight Tonnage Trends
- 4.21 Infrastructure
- 4.22 Regulatory Framework (Road and Rail)
- 4.23 Regulatory Framework (Sea and Air)
- 4.24 Value Chain and Distribution Channel Analysis
- 4.25 Market Drivers
 - 4.25.1 E-Commerce Parcel Surge and Last-Mile Investments
 - 4.25.2 Cold-Chain Demand from Food and Pharma Exports
 - 4.25.3 Infrastructure Upgrades Under NRRP and TEN-T Corridors
 - 4.25.4 Industry 4.0 Tax Credits Boosting Smart-Logistics Tech
 - 4.25.5 Locker Networks Altering Urban PUDO Mix
 - 4.25.6 Rail-Upgrade Disruptions Shifting Volumes to Road
- 4.26 Market Restraints
 - 4.26.1 Driver Shortages and Ageing Truck Fleet
 - 4.26.2 High North-South Operating-Cost Differential
 - 4.26.3 2025 Rail-Works Capacity Crunch on Key Port Corridors
 - 4.26.4 Battery-Hazmat Rules Raising EV-Logistics Compliance Cost
- 4.27 Technology Innovations in the Market
- 4.28 Porter's Five Forces Analysis
 - 4.28.1 Threat of New Entrants
 - 4.28.2 Bargaining Power of Buyers
 - 4.28.3 Bargaining Power of Suppliers
 - 4.28.4 Threat of Substitutes
 - 4.28.5 Competitive Rivalry

5 Market Size and Growth Forecasts (Value, USD)

- 5.1 End User Industry
 - 5.1.1 Agriculture, Fishing, and Forestry
 - 5.1.2 Construction
 - 5.1.3 Manufacturing
 - 5.1.4 Oil and Gas, Mining and Quarrying
 - 5.1.5 Wholesale and Retail Trade
 - 5.1.6 Others
- 5.2 Logistics Function
 - 5.2.1 Courier, Express, and Parcel (CEP)
 - 5.2.1.1 By Destination Type
 - 5.2.1.1.1 Domestic

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- 5.2.1.1.2 International
- 5.2.2 Freight Forwarding
 - 5.2.2.1 By Mode of Transport
 - 5.2.2.1.1 Air
 - 5.2.2.1.2 Sea and Inland Waterways
 - 5.2.2.1.3 Others
- 5.2.3 Freight Transport
 - 5.2.3.1 By Mode of Transport
 - 5.2.3.1.1 Air
 - 5.2.3.1.2 Pipelines
 - 5.2.3.1.3 Rail
 - 5.2.3.1.4 Road
 - 5.2.3.1.5 Sea and Inland Waterways
- 5.2.4 Warehousing and Storage
 - 5.2.4.1 By Temperature Control
 - 5.2.4.1.1 Non-Temperature Controlled
 - 5.2.4.1.2 Temperature Controlled
- 5.2.5 Other Services

6 Competitive Landscape

- 6.1 Market Concentration
- 6.2 Key Strategic Moves
- 6.3 Market Share Analysis
- 6.4 Company Profiles (Includes Global Level Overview, Market Level Overview, Core Segments, Financials as Available, Strategic Information, Market Rank/Share for Key Companies, Products and Services, and Recent Developments)
 - 6.4.1 Amazon
 - 6.4.2 Arcese Trasporti SpA
 - 6.4.3 BRT SpA
 - 6.4.4 CMA CGM Group (Including CEVA Logistics)
 - 6.4.5 DHL Group
 - 6.4.6 DSV A/S (Including DB Schenker)
 - 6.4.7 FedEx
 - 6.4.8 Fercam SpA
 - 6.4.9 International Distributions Services PLC (Including GLS)
 - 6.4.10 Grimaldi Group
 - 6.4.11 GRUBER Logistics SpA
 - 6.4.12 Italsempione
 - 6.4.13 Italtrans
 - 6.4.14 Kuehne+Nagel
 - 6.4.15 Mercitalia Rail
 - 6.4.16 MSC Mediterranean Shipping Company S.A.A
 - 6.4.17 Poste Italiane
 - 6.4.18 Savino Del Bene SpA
 - 6.4.19 Transmec Group
 - 6.4.20 United Parcel Service of America, Inc. (UPS)

7 Market Opportunities and Future Outlook

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7.1 White-Space and Unmet-Need Assessment

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