

Italy - Transport and Logistics: Infrastructure investment to drive growth (Strategy, Performance and Risk Analysis)

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Abstracts

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SUMMARY

With a GDP of over US\$1.9tn in 2017, Italy is the fourth-largest economy in Europe. It has a diversified financial system, known for its high-end products. Manufacturing is well developed, with motor vehicles, machinery, chemicals, pharmaceuticals, fashion and clothing all key industries. According to the World Economic Forum's Global Competitiveness Index 2017-2018, Italy scored high on the parameters of health, education, business sophistication, and market size. However, the country's high tax burden and lack of financing options pose challenges to growth.

MarketLine's Premium industry reports provide a comprehensive overview of the market and include sections on: risk and reward, key industry trends and drivers, SWOT analysis, competitive landscape, innovation, deals, key developments, and industry benchmarking to compare key performance indicators with regional and global markets.

Key highlights

Decline in freight affecting road transport GVA

Total GVA generated from road transportation registered a CAGR of -3.9%, falling from US\$46.4bn in 2012 to US\$37.9bn in 2017. A decline in national and international transport, coupled with a decrease in trade activities, drove the trend. Road

transportation GVA is anticipated to post a CAGR of -6.3%, from US\$34.9bn in 2018 to US\$26.9bn in 2022 due to a decrease in road freight.

Network growth to drive rail freight

Italy's rail freight recorded a CAGR of -0.8%, falling from 20.2 billion tonne km in 2012 to 19.5 billion tonne km in 2017. A decline in the length of the country's operational rail network led to a decrease in freight traffic. Network length posted a CAGR of -0.4%, falling from 17,060.0km in 2012 to 16,737.9km in 2017. However, due to investments in network improvements and cross-border rail projects, rail freight traffic is anticipated to post a CAGR of 1.5%, to rise from 19.6 billion tonne km in 2018 to 20.8 billion tonne km in 2022.

GVA from warehousing and storage to decline

GVA for warehousing and storage recorded a CAGR of -3.9%, falling from US\$34.4bn in 2012 to US\$28.2bn in 2017. A decline in transport services caused by a lack of productivity in various sectors affected GVA. In addition, a lack of investment in the building of new facilities deterred growth. Over the forecast period, GVA from warehousing and storage will post a CAGR of -6.7%, falling from US\$25.7bn in 2018 to US\$19.4bn in 2022. The segment accounted for 35% of total transport and logistics GVA in 2017, a share anticipated to fall to 31% in 2022.

SCOPE

Risk & Reward Index: The Risk & Reward index compares the position of the Italian transport and logistics industry with other countries in the region in terms of specific risk and reward parameters.

Industry Snapshot and Industry View: Key transport and logistics industry statistics include freight traffic, freight volume, fleet size, passengers, import and exports gross value added, FDI and trends driving market performance.

Industry SWOT Analysis: Discover the strengths, weaknesses, opportunities and threats impacting market performance and investment in the Italian transport and logistics market.

Industry Benchmarking: Benchmark how the Italian transport and logistics market is performing compared to regional and global markets in terms of GVA,

fleet size and freight traffic by mode.

Competitive Landscape: Overview of industry players compared with their peers across a set of indicators.

REASONS TO BUY

How is the market performing in terms of indicators such as freight traffic, freight volume, fleet size, passengers, import and export, gross value added and FDI?

How risky is it to invest in the Italian transport and logistics industry compared to other countries in Western Europe?

What is driving the performance of key industry segments such as land, air, water and rail?

Who are the leading players in the Italian transport and logistics industry and their presence in respective segment?

What trends are being witnessed within the Italian transport and logistics industry?

What are the Italian transport and logistics industry's strengths and weaknesses and what opportunities and threats does it face?

What are the recent developments and innovations in the Italian transport and logistics industry?

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