

Italy Apparel Logistics - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2024 - 2029)

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Abstracts

The Italy Apparel Logistics Market size is estimated at USD 4.51 billion in 2024, and is expected to reach USD 5.16 billion by 2029, growing at a CAGR of 2.96% during the forecast period (2024-2029).

Key Highlights

According to the data released by Confindustria Moda, Italy's fashion trade body, revenue in the textile and fashion sector in Italy increased by 3% to EUR 112.4 billion (USD 121.0 billion) in the previous year.

Higher sales values have contributed to the growth of the market, but there has been a significant decrease in volumes, suggesting that the economic recovery from the COVID-19 pandemic may be coming to an end.

Revenues have increased, but the industry faces challenges in terms of profit margins due to rising energy and raw materials costs. The trade body is optimistic that energy costs will return to the pre-COVID levels of 2024, but there are still doubts about the future trajectory of raw materials costs.

Year-on-year (YoY) growth in exports for textile and fashion was 5.1% to EUR 55.4 billion (USD 59.67 billion), with 48% going to the EU and 54.2% to non-EU destinations.

Fashion e-commerce is at an inflection point in Italy. Despite the constant delays in the Italian market development due to the lack of infrastructure, e-commerce penetration reached 68% so far, which is lower than the penetration rates in UK (83%) and France

(79%).

Yet, Italy's online fashion and shopping sector is constantly growing. Currently, the clothing sector accounts for 18.2% of Italy's total online shopping market. It's expected to grow further in the years to come. In Italy, 75% of online purchases are made through mobile devices, with some companies reaching 90% in the case of Zalando, Shein, and Nike.

Italy Apparel Logistics Market Trends

Increasing demand from consumers is driving the market

Confindustria Moda's latest report shows a complex economic landscape for Italy's fashion industry, which employs more than 5.3 million people in 150,000 companies operating in the manufacturing and service sectors, with a turnover of EUR 111.7 billion (USD 120.51 billion) in the previous year, which is a year-on-year increase.

However, this increase is volatile because it is based on higher sales value rather than actual product volume — a sign of the slow recovery from the COVID-19 pandemic. The association is concerned about this shift and is lowering its expectations for the current year. Although revenue is increasing, challenges are mounting in the form of lower profit margins due to higher energy and raw material costs.

The outlook for this year is optimistic, with the expectation that energy costs will return to pre-COVID levels, although there are still uncertainties regarding raw materials. In terms of export volume, the sector grew by 5.1% in the first half of the previous year to a total of EUR 54.5 billion (USD 58.80 billion).

The European Union accounted for 47% of total exports, with regions outside the EU making up the remaining 53%. China, in particular, is expected to see a shift towards domestic products in favour of imports.

The industry faces a number of challenges, such as instability in the world, geopolitical changes, and increasing production costs. To overcome these, it is essential to work together to address issues in terms of training, sustainability and innovation, which will strengthen the industry in the face of future challenges.

Online sales and high internet penetration driving the market

About 40 million consumers shop online. Italy is lagging behind its European peers in fixed broadband, and many small and medium-sized enterprises (SMEs) lack the financial means to modernize their infrastructure. E-commerce in Italy generated a revenue of EUR 77 billion (USD 82.93 billion), although inflation contributed to the year-on-year increase.

All forms of online shopping are available, and digital payment systems have developed significantly. Cash accounted for 44% of all transactions, but e-commerce is expected to continue its upward trajectory. The top e-commerce sites in Italy are Amazon, eBay, Subito, Zalando, and Apple.

Italy's internet penetration rate was 86.5% at the beginning of the previous year, according to Kepios analysis. Italy had 50.79 million internet users. The number of internet users decreased by 141,000, or 0.3% in the last two years.

In Italy, the median mobile broadband connection speed increased by 4.72 megabytes per second (Mbps) in the 12-month period last year, or 13.7%. In Italy, fixed internet connection speeds increased by 20.7%, rising to 10.30Mbps.

Italian consumers are increasingly turning to digital services, and the market is evolving. The digital transformation is driven by government investments in infrastructure and key players.

Italy Apparel Logistics Industry Overview

The Italian apparel logistics market is moderately fragmented. While some major international players like Geodis Italia, DHL Supply Chain Italy, DB Schenker Italy, Kuehne + Nagel Italy, Bollore Logistics Italy, etc., there is also a significant presence of local logistics providers.

Following Q3 earnings growth, Zalando, an online fashion retailer, is investing in logistics and technology to fuel future growth.

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The market estimate (ME) sheet in Excel format

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