Abstract

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DVZ TOP 100

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TOP 100 in European Transport and Logistics Services 2024 2025

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A study by
Fraunhofer Institute for Integrated Circuits IIS
Division Supply Chain Services

Fraunhofer IIS

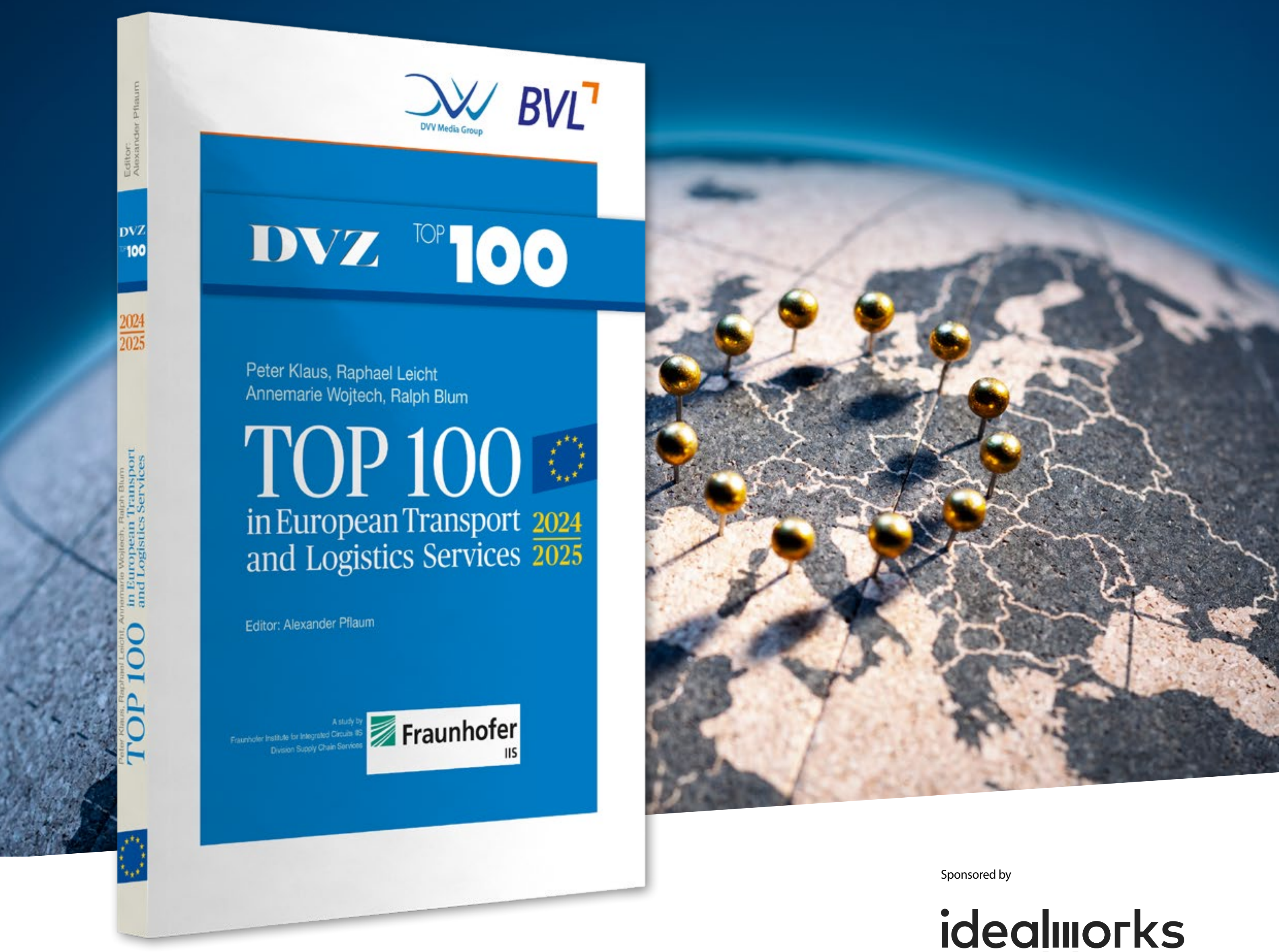
www.dvz.de/top-100-europe

Europe's » TOP 100 « Logistics Providers

Highlights – Contents –
Executive Summary

An essential resource for decision makers in the logistics industry, suppliers, regulators and researchers:

- ⇨ the most comprehensive study of the European transport & logistics market at 300 pages
- ⇨ a quantitative record of market growth and contraction experiences during the turbulent years from Pre-Covid 2019 to 2024
- ⇨ at four levels of detail: European totals, the 27 EU countries plus UK, Norway and Switzerland, ten logistics market segments and the »Top 100« logistics service providers, with company profiles and revenue league tables
- ⇨ a deep dive into the complex world of logistics and supply chain management for logistics industry insiders and outsiders



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Europe’s TOP 100 Logistics Providers – In the Spotlight

Unlock the latest trends and insights in the European transport and logistics sector with the “TOP 100 in European Transport and Logistics Services 2024/2025”. This comprehensive, English-language study offers in-depth analysis of the European logistics landscape.

Shaping the Future of Logistics – Where Disruption Meets Opportunity

The **„Top 100 in European Transport and Logistics Services 2024/2025“** study captures the logistics sector at a defining moment. Geopolitical upheavals, the digital revolution and the drive for sustainability are not just reshaping supply chains — they are rewriting the rules of success. In 2023, Europe‘s logistics market soared to an impressive €1.6 trillion, underlining its critical role in keeping economies moving, even as real transport volumes declined.

This landmark report offers unrivalled insights into ten key market segments, analyses the shifting dynamics of 30 national logistics markets, and unveils the Top 100 logistics providers who are redefining leadership under pressure. It highlights the pivotal trends transforming the industry, from the slowing of outsourcing growth to the widening gap between nominal spend and real activity.

Produced by Fraunhofer IIS in partnership with DVV Media Group, the study provides essential intelligence for those determined to turn uncertainty into competitive advantage.

Be where the future of logistics is decided — with the Top 100 study as your guide.

What’s Inside:

Current Market Analysis

Gain a clear understanding of how the logistics market has evolved over time—and what drives its dynamics today.

Trend Analysis & Future Outlook

Explore ten core market segments and discover forward-looking innovations such as contract logistics and specialized services.

Resilience in Challenging Times

From pandemic-induced disruptions to geopolitical tensions, the logistics industry has showcased agility and strength.

Detailed Country Profiles

Dive into logistics activity across 30 European countries, supported by key performance indicators and demographic data.

Segmented Market Overview

The study breaks down the European logistics market into 10 strategic segments, including air freight, sea freight, road transport, and other value-added services.

Top 100 Logistics Providers

Identify the largest players in the European logistics market—ranked by revenue and presented with detailed company profiles.

Key Highlights:

Extensive Data Analysis

Built on enriched primary data, the study delivers precise figures on logistics volumes throughout Europe.

Europe vs. USA

A strategic comparison between European and U.S. logistics markets, helping you spot parallels, differences, and opportunities.

Comprehensive Company Profiles

Explore in-depth profiles of the TOP 100 logistics service providers in Europe, including performance metrics and market positioning.

Gain a Strategic Advantage Through Market Intelligence

With access to detailed rankings and analytical insights, this study enables you to benchmark your company's market position, identify potential partners, and uncover competitive advantages. It is a powerful tool for making informed, data-driven decisions.

A must-have for decision-makers, analysts, and professionals who want to navigate the European logistics market with confidence. Order now!

Europe's TOP 100 Logistics Providers – Contents

Revenue Ranking (Example)

Rank	Company	Country	Data Quality	Logistics Revenue in m. € Worldwide	Logistics Revenue in m. € Europe	Employees	Bulk Transport revenue 2023 in m. €
1	2	3	4	5	6	7	8
1	Deutsche Post →**DHL** Group	Germany	***	74.204	**37.932**	547.692	
2	**Deutsche Bahn** →**DB** (parent) *incl.* ***DB Cargo, DB Schenker***	Germany	**	24.583	**15.587**	106.620	2.500
3	**La Poste** Group (parent) *incl.* ***Geopost, DPD, SEUR***	France	**	16.070	**13.500**	142.504	
4	**Kühne & Nagel**	Switzerland	***	24.477	**12.142**	94.218	
	GeoPost, part of **La Poste**	France	**	[illegible]3.070	**10.[illegible]**	[illegible]6.875	
5	**DSV**	Denmark	***	20.205	**10.375**	72.577	
	DB Schenker, part of **DB**	Germany	**	19.104	**10.213**	75.062	
6	**MSC** Mediterranean Shipping Company	Switzerland	*	50.500	**10.100**	160.000	
7	United Parcel Service (→**UPS**)	United States	**	82.404	**10.000**	500.000	
8	**CMA CGM** (parent) *incl.* ***CEVA*** & ***Gefco***	France	**	45.962	**9.600**	160.000	
9	A.P. Moeller →**Maersk**	Denmark	**	46.786	**9.357**	106.000	
10	**International Distribution Services** IDS (parent) *incl.* ***Royal Mail*** *& GLS*	United Kingdom	***	9.716	**9.099**	153.552	
	Sum Top 10			**394.907**	**137.692**	**2.043.163**	**2.500**
11	**FedEx Express**	Netherlands/ United States	**	77.805	**7.500**	529.000	
12	**SNCF** (parent) incl. ***Geodis*** & ***RLE***	France	*	13.143	**7.104**	283.000	350
13	**Rhenus** (parent) incl. ***Contargo***	Germany	***	7.500	**6.670**	40.000	950
14	**Hapag-Lloyd**	Germany	***	17.930	**6.587**	16.300	
15	**Dachser**	Germany	***	7.157	**6.438**	33.982	
16	**DP World** (Europe) *incl.* ***Imperial Logistics***	United Arab Emirates	**	12.558	**6.434**	100.000	
	Geodis *(* part of **SNCF***)*	France	*	11.600	**6.400**	52.819	
17	**GXO** Logistics	United States	***	8.858	**6.215**	130.000	
	DB Cargo *(* part of **DB***)*	Germany	***	5.279	**5.279**	31.359	2.500
	General Logistics Systems (→**GLS***) part of IDS*	Netherlands	**	5.608	**4.991**	23.521	
	Royal Mail *Group, part of* ***IDS***	United Kingdom	***	4.108	**4.108**	130.031	
18	**STEF**	France	**	3.832	**3.832**	22.280	
	Ceva *Logistics, part of* **CMA CGM**	France	**	20.200	**3.220**	110.000	
19	**DFDS** Group	Denmark	**	3.038	**3.000**	13.191	
20	***La Poste Services-Mail-Parcel*** Division, part of **La Poste**	France	**	3.000	**3.000**	102.369	
21	**XPO** Logistics	USA	**	7.016	**2.784**	38.041	
22	**LKW WALTER**	Austria	***	2.780	**2.646**	5.000	
23	**Walden** Group (ehem. EHDH)	France	**	2.600	**2.600**	7.407	
24	**Bolloré** Holding	France	**	6.000	**2.500**	15.000	
25	**Culina** Group (parent) *incl.* ***Stobart***	United Kingdom/ Germany	**	2.500	**2.500**	22.000	
	Top 25			**97.912**	**207.502**	**828.570**	**1.300**

Table 29 The "TOP 100" list of the largest logistics service providers in Europe by revenue (continued).
Source: Fraunhofer IIS

Revenue Ranking (Example)

Ocean Shipping revenue 2023 in m. €	Air Cargo Transportation revenue 2023 in m. €	General Full-Truckload (FTL/FCL) revenue 2023 in m. €	General Less-than-Truckload (LTL) revenue 2023 in m. €	Courier, Express and Parcel (CEP) revenue 2023 in m. €	Terminal and Storage Services revenue 2023 in m. €	Global Forwarding revenue 2023 in m. €	Contract Logistics revenue 2023 in m. €	Special Products Logistics revenue 2023 in m. €	World/Group/Consolidated Revenue
9	10	11	12	13	14	16	15	17	18
		956	1.434	22.209		[illegible]	6.732		**81.758**
		4.508	3.989	313		1.706	1.371	1.200	**45.191**
				13.500					**34.073**
		370	1.490			7.930	2.352		**n/a**
				10.500					**15.679**
		1.972	1.972			4.715	1.718		**n/a**
		2.835	3.989	313		1.706	1.371		**n/a**
7.540		464			1.400	464	232		**56.000**
				8.500		900	600		**82.404**
5.900					500	1.620	1.580		**n/a**
6.125		253	127		700	1.266	886		**46.469**
				9.099					**14.616**
19.565	**0**	**8.523**	**9.012**	**53.621**	**2.600**	**25.202**	**15.471**	**1.200**	
				7.500					**81.676**
		1.020	998	256		2.048	2.432		**41.760**
		490	1.140		500	1.140	1.700	750	**7.500**
6.400					187				**n/a**
		698	3.138			634	1.150	818	**n/a**
600		660	360		2.530	1.400	584	300	**16.600**
		666	998	256		2.048	2.432		**n/a**
							6.215		**n/a**
		1.579						1.200	**n/a**
				4.991					**14.616**
				4.108					**14.616**
							1.150	2.682	**4.442**
						1.620	1.600		**45.962**
		1.350					300	1.350	**3.662**
				3.000					**9.936**
		1.480	200			200		904	**7.016**
		2.646							**n/a**
				1.050				1.550	**2.900**
					300	1.500	700		**n/a**
		500				200		1.800	**9.200**
7.000	**0**	**8.844**	**5.836**	**4.306**	**3.517**	**7.122**	**14.231**	**10.154**	

Company Profile (Example)

Arvato SE, Gütersloh (Germany)

Headquarters	Arvato SE Reinhard-Mohn-Straße 22 33333 Gütersloh / Germany
CEO	Frank Schirrmeister
Website	www.arvato.com

Revenue

Logistics Revenue, geographical (mill. €)	**2020**	**2021**	**2022**	**2023**	Remarks
World (incl. Europe)	1.800	*2.000*	2.300	2.300	*2021 IIS estimated*
Europe (incl. Germany)	**1.505**	***1.672***	**1.890**	**1.888**	
Germany	670	*718*	791	814	
Logistics Revenue by market segments (mill. €) - Europe					
Contract Logistics	1.505	*1.672*	1.890	1.888	
ARVATO GROUP - Group revenue incl. non-logistics revenue (mill. €)	4.382	5.035	5.564	5.476	
BERTELSMANN SE & Co. KGaA - Group revenue incl. non-logistics revenue (mill. €)	17.289	18.696	20.245	20.169	

Resources

Staff (nr.)	16.000	17.000	17.000	17.000	Arvato
Staff (nr.)				25.221	Arvato Group
Staff (nr.)	132.842	145.000	145.000	80.418	Bertelsmann worldwide

Performance Data

	n.a.	

Company Profile

Arvato Group is the diversified service division of the Bertelsmann Corporation, a worldwide publishing and media company. Arvato Group itself has four major business units, one of which is Arvato "Logistics and Fulfilment Services". Its main service offerings are warehousing and delivery, inventory management, order and returns management. Arvato Logistics' main customers are companies from the publishing, tech, healthcare, automotive, fashion, beauty and lifestyle sectors.
Arvato´s strategy is to develop innovative, high-value supply chain management and e-commerce solutions by combining deep industry expertise with advanced technologies.

History and Ownership

Arvato´s roots were related to the Bertelsmann core businesses in media and publishing. In 1999 Bertelsmann Arvato was created. In 2014 Arvato merged with e-commerce and logistics service provider **Netrada**, making the company one of the leading European service providers for integrated e-services. Majority owners of Bertelsmann are the Bertelsmann foundation and the founder's family Mohn.

Recent Developments

In recent years the global location network of Arvato was expanded by establishing new and expanding existing distribution centers, particularly in the USA, Poland and Spain. 2022 Arvato expanded in China, by acquisition of two new customers in the e-commerce sector. In 2022 Arvato acquired the logistics service provider **Quickly** in Italy. In 2023 a cooperation was announce with Boston Dynamics to further advance the targeted use of robots in its global logistics centers.

References: Bertelsmann Annual Reports 2020-2023, Arvato climate reports 2021-2023 and Fraunhofer IIS Research (**)

Executive Summary

Disruptions and Complexity in European Logistics

In 2023, European logistics spending nearly reached €1.6 trillion, underlining the sector's dynamic role. However, between 2020 and 2024, the industry faced unparalleled disruptions, triggered by pandemic lockdowns, supply shortages, extreme weather, regulatory shifts, and geopolitical crises like the Ukraine and Gaza wars. These events caused volatile business volumes, rising costs, and major transport price fluctuations.

Shifting Economic and Logistics Patterns

After a decade of continuous growth, European GDP fell in 2020. Although signs of recovery and inflation emerged in 2021, and 2022 suggested normalization, data from 2023 and early 2024 show a different trend: while GDP grows moderately, the volume of physical goods declines. This signals deeper structural changes impacting logistics demand and supply chains.

Study Objectives and Methodology

This study provides answers through robust data analysis, offering insights into Europe's logistics spend, real activity levels, and market dynamics. Key terms are precisely defined, methods transparently explained. In 2023, logistics spend comprised 51% transport (€816 billion), 27% warehousing, 12% inventory holding, and 10% administrative costs.

Diverging Trends: Nominal vs Real Growth

From 2019 to 2023, logistics spending rose significantly faster than general inflation, while actual transport and handling volumes declined. This divergence, mainly driven by volatility in air and ocean rates, reflects a decoupling of logistics costs from real activity.

Third-Party Logistics and Market Saturation

Approximately 55% of Europe's logistics spend is outsourced. After decades of steady growth, outsourcing shows signs of stagnation. Comparisons with U.S. markets reveal similar trends, with even stronger volatility.

Country and Provider Landscape

Germany led logistics spending in 2023 with €327 billion, followed by France, the UK, Italy, Spain, Poland, and the Netherlands. „Logistics inflation" is most evident in Poland, Germany, and Sweden. A handful of major service providers increasingly dominate multiple national markets, accelerating sectoral consolidation.

Segmentation and Addressable Markets

Europe's logistics market covers ten key segments, from bulk to contract logistics. Of the €1.6 trillion total spend, €1.192 trillion is addressable by service providers, with €873 billion already outsourced. Segment-specific profiles highlight competitive dynamics and outsourcing potential.

The Top 100 Logistics Companies

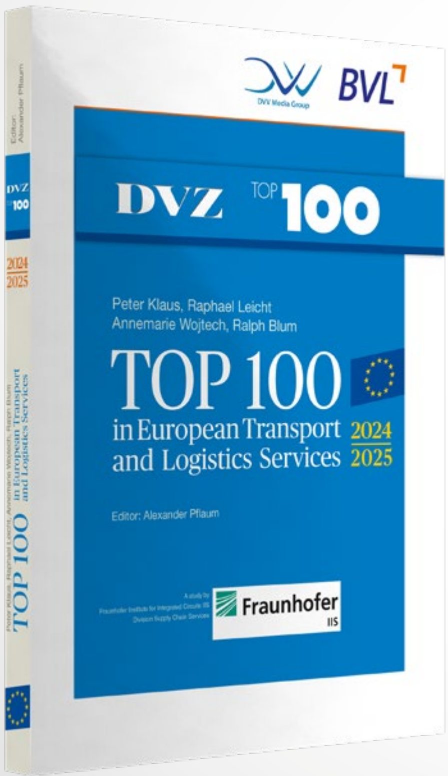
The Top 100 ranking lists Europe's leading providers by revenue, led by DHL Group, DB/Deutsche Bahn, and La Poste Group. Each profile details European revenues, global reach, and segment breakdowns.

Key Takeaways

The study highlights three lasting changes: logistics activities are increasingly disconnected from GDP growth; nominal growth outpaces real activity; and market power concentrates among owners of critical infrastructure. Ongoing market monitoring and analysis are essential to navigate this evolving landscape.

TOP 100 in European Transport and Logistics Services 2024/2025 – order now!

Essential for planners and decision makers



Europe's Logistics Leaders – Trends, Insights, Strategy

This compact study presents the leading 100 transport and logistics providers in Europe, ranked by revenue, market presence, and innovation.

Key Highlights:

- Market Trends: Stable growth despite economic pressure. Strong focus on sustainability, digitalization, and green logistics.
- Top Players: Germany, France, and the UK dominate the rankings.
- Challenges: Regulatory pressure, supply chain disruptions, and talent shortages.
- Innovation: AI, automation, and zero-emission logistics are reshaping the industry.
- Outlook: Success depends on green investments, tech adoption, and navigating global competition.

A must-read for logistics professionals, decision-makers, and strategists.

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