

The Robotics Ecosystem

Abstract



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in European Transport and Logistics Services 2025

Editor: Alexander Pflaum



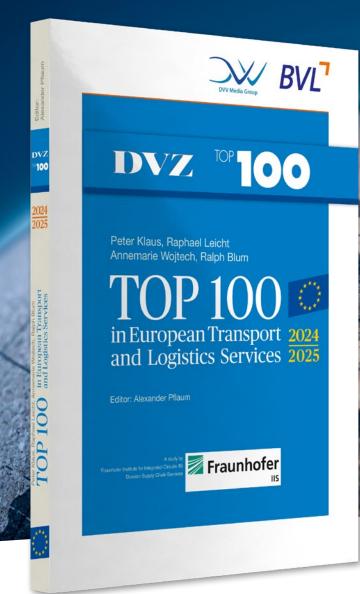


Europe's >> TOP 100 « Logistics Providers

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:



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:



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

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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
		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	**	2 970	10. ₹6.)	Jô.8/5	
	5	DSV	Denmark	***	20.205	10.375	72.577	
		DB Schenker, part of DB	Germany	**	19.104	10.213	75.062	
ANDI E	6	MSC Mediterranean Shipping Company	Switzerland	*	50.500	10.100	160.000	
AMPLE		United Parcel Service (→UPS)	United States	**	82.404	10.000	500.000	
		CMA CGM (parent) incl. CEVA & Gefco	France	**	45.962	9.600	160.000	
		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
		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	
		Тор 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)

9 10 11 12 13 14 16 15 17 18 81.758	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
1.508	9	10	11	12	13	14	16		17	
13.500 34.073 34.073 34.073 34.073 370 1.490 7.930 2.352 7/a 7.579 7.5			956	1.434	22.209		(.30	6 732		81.758
1.490			4.508	3.989	313		1.706	1.371	1.200	45.191
1.972 1.972 1.972 4.715 1.718 n/a n/a 2.835 3.989 313 1.706 1.371 n/a n/a 7.540 464 8.500 900 600 82.404 5.900 1.620 1.880 n/a 14.616 19.565 0 8.523 9.012 53.621 2.600 25.202 15.471 1.200 1.676 1.700 1.140 1.700 750 1.676 1.700 1.676 1.700		EY	MIP		13.500					34.073
1.972 1.972 3.989 313 1.706 1.371 7.20 7.540 464 3.22 56.000 6.00 6			370	1.490			7.930	2.352		n/a
					10.500					15.679
7.540 464 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 19.565 0 8.523 9.012 53.621 2.600 25.202 15.471 1.200 19.565 0 8.523 9.012 53.621 2.600 25.202 15.471 1.200 10.020 998 256 2.048 2.432 41.760 41.760 61.700 750 7.500			1.972	1.972			4.715	1.718		n/a
Section Sect			2.835	3.989	313		1.706	1.371		n/a
5.900	7.540		464			1.400	464	232		56.000
1.25					8.500		900	600		82.404
1.25	5.900					500	1.620	1.580		n/a
14.616	6.125		253	127		700		886		46.469
19.565 0					9.099					14.616
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600 698 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 1.579 4.991 1.200 n/a 1.4616 4.991 1.150 2.682 4.442 1.150 2.682 4.442 1.600 45.962 1.350 1.350 300 1.350 3.662 1.480 200 200 904 7.016 2.646 1.050 1.500 700 n/a 500 300 1.500 700 n/a 500 300 1.500 700 1.800 9.200	6 400		490	1.140			1.140	1.700	750	
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 1.579 1.200 n/a 1.616 1.579 1.200 1.500	0.400		698	3.138		107	634	1.150	818	
1.579	600					2.530				
1.579			666	998	256		2.048	2.432		n/a
4.991 14.616 4.108 11.150 2.682 4.442 1.350 1.620 1.600 45.962 1.350 300 1.350 3.662 1.480 200 200 904 7.016 2.646 1.050 1.550 2.900 500 200 1.800 9.200								6.215		n/a
4.991 14.616 4.108 11.150 2.682 4.442 1.350 1.620 1.600 45.962 1.350 300 1.350 3.662 1.480 200 200 904 7.016 2.646 1.050 1.550 2.900 500 200 1.800 9.200			1.579						1.200	n/a
1.150 2.682 4.442 1.620 1.600 45.962 1.350 3.000 300 1.350 3.662 9.936 1.480 200 200 904 7.016 2.646 1.050 1.550 2.900 1.500 700 n/a					4.991					
1.620 1.600 45.962 1.350 3.000 300 1.350 3.662 3.000 200 904 7.016 2.646 1.050 300 1.500 700 n/a 500 200 1.800 9.200					4.108					14.616
1.350 3.662 3.000 200 9.936 1.480 200 200 904 7.016 2.646 1.050 1.550 2.900 1.500 700 n/a 500 200 1.800 9.200								1.150	2.682	4.442
3.000 9.936 1.480 200 200 904 7.016 2.646 1.050 1.550 2.900 1.500 700 n/a 500 200 1.800 9.200							1.620	1.600		45.962
3.000 9.936 1.480 200 200 904 7.016 2.646 1.050 1.550 2.900 1.500 700 n/a 500 200 1.800 9.200			1.350					300	1.350	3.662
2.646					3.000					9.936
2.646			1.480	200			200		904	7.016
1.050 1.550 2.900 1.550 700 n/a 500 200 1.800 9.200										
300 1.500 700 n/a 500 200 1.800 9.200					1.050				1.550	
500 200 1.800 9.200						300	1.500	700		
7.000 0 8.844 5.836 4.306 3.517 7.122 14.231 10.154			500						1.800	
	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. €) -

Contract Logistics	EYAM	D ₁ 505	1.672	1.890	1.888	
	LAA					
ARVATO GROUP - Group revenue revenue (mill. €)	e incl. non-logistics	4.382	5.035	5.564	5.476	
BERTELSMANN SE & Co. KGaA - 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

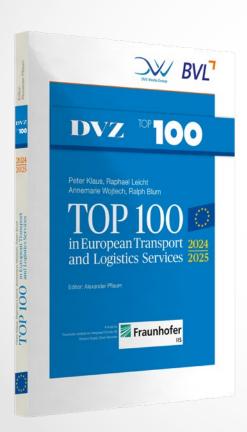
The Top 100 ranking lists Europe's leading providers by revenue, led by DHL Group, DB/Deutsche Bahn, and La Poste Group. Each profile details European revenues, global reach, and segment breakdowns.

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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