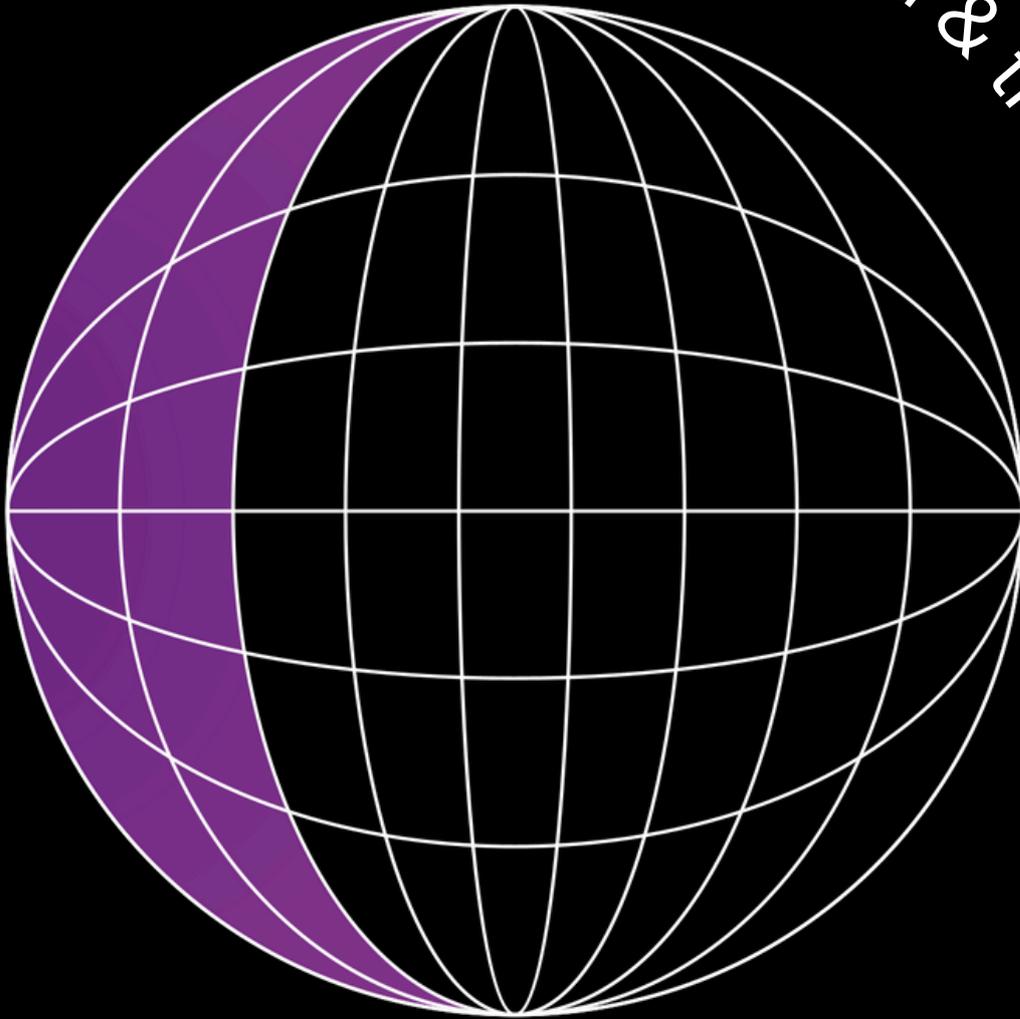ShippyPro

Logistics Outlook 2026

✦ Shipping data & trends for 2026-2030

The Context

Last-mile logistics today represents the closing stage of the supply chain: not only the most expensive stretch – accounting for up to 65% of total transport costs according to Last-Mile Experts – but also the point at which customer satisfaction and the resilience of the logistics system are measured.

With the unstoppable growth of e-commerce, the demand for fast, flexible, and transparent deliveries has become more than a competitive option: it is the key to retaining and delighting an increasingly demanding consumer.
In this European landscape, organisations face a dual strategic challenge.
 On one side, there is the urgency to optimise costs – with labour costs accounting for more than half of last-mile expenses.
 On the other, logistics must evolve towards more agile, sustainable, and customer-experience-oriented models, incorporating elements such as Out-of-Home (PUDO) networks, micro-fulfilment, real-time traceability, and optimised routes.

Beyond efficiency, the urgency is growing to transform delivery into a reputational asset: sustainability is becoming increasingly integrated into operational strategies.
 Companies able to combine cost control, high-level service, and environmental commitment will build a solid and distinctive competitive advantage.

This research aims to serve as a comprehensive strategic guide to the operational and organisational levers of logistics.
 We will analyse investment priorities, the technologies enabling efficiency and control, emerging delivery models, and the cultural and infrastructural changes required.

 As we move towards the 2030 Agenda deadline, the sector has both the opportunity and the responsibility to reinvent itself: making delivery flexible, fast, green, and reliable is no longer a future goal, but an urgent and immediate challenge.

A REPORT BY

ShippyPro

Last-Mile Logistics
Cost Analysis and Optimisation

Last-Mile Logistics: Cost Analysis and Optimisation Last-mile logistics refers to the final stage of the delivery process, i.e., the journey a product takes from the distribution centre to the end consumer. An essential step in completing the delivery, it is expected to grow over the next decade due to the expansion of ecommerce, increasing urbanisation, and consumer demand for faster deliveries.

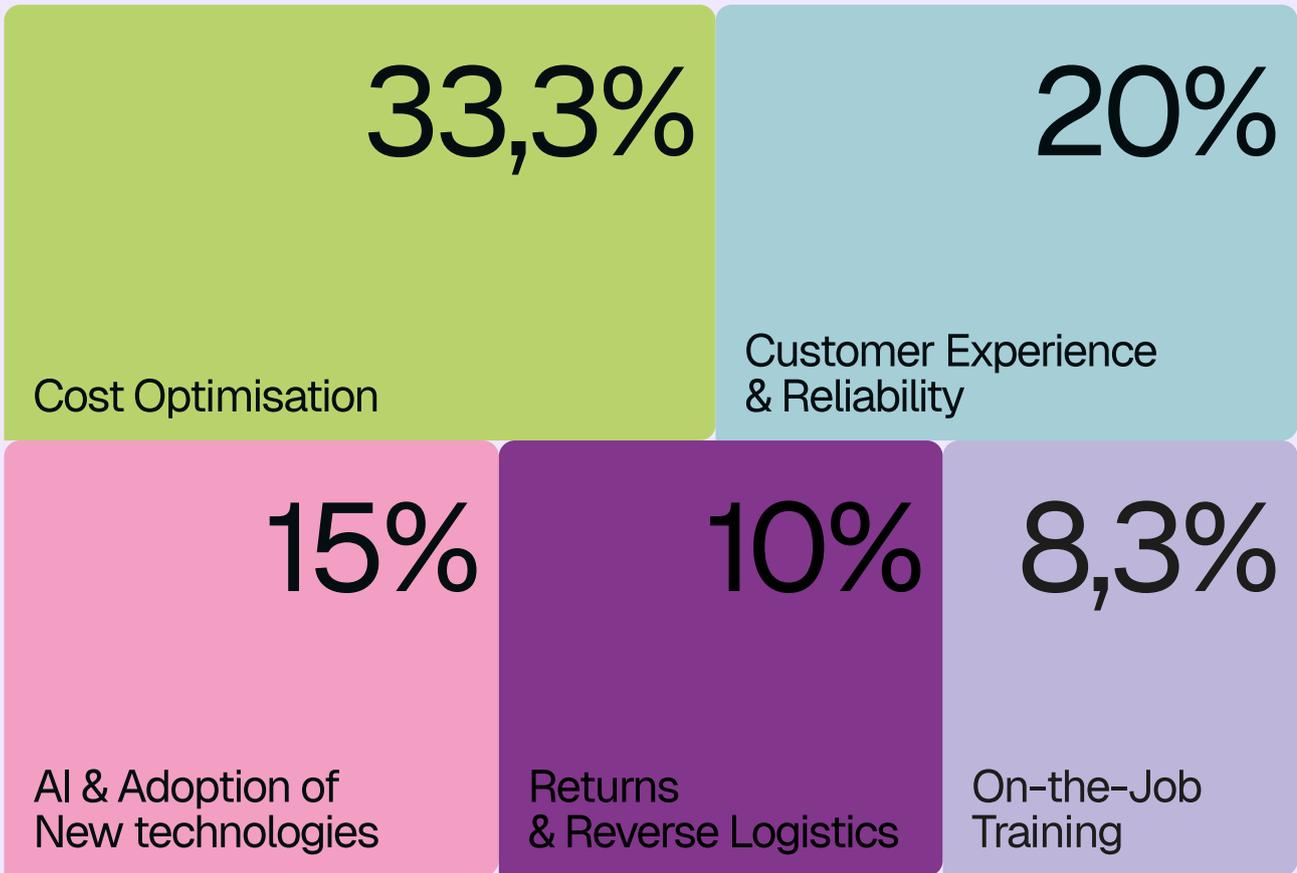This stage is crucial in ensuring a satisfying purchase experience and fostering customer loyalty.

Beyond being a key moment in the purchasing process, the last mile today accounts for a significant share of costs (according to Last-Mile Experts, around 65% of all transport costs from the producer to the consumer).

Not to mention that company costs are on the rise. In particular, labour costs account for 51.6% of total last-mile expenses.

It's no surprise, then, that the top priority according to recent statistics is cost optimisation.

Country	Avg. labour cost % Increase
Switzerland	38
France	21.5
UK	17.8
Lithuania	15
Italy	10.8
Denmark	9
Netherlands	7.1
Portugal	6.7
Germany	6.1

Source: Eye On The Last Mile 4.0 Europe ed. 2025, Last-Mile Leaders

33,3% Cost Optimisation	20% Customer Experience & Reliability

15% AI & Adoption of New technologies	10% Returns & Reverse Logistics	8,3% On-the-Job Training

Beyond the priorities highlighted in the data, the research also identified additional areas of interest for companies. Sustainability stands out as a major concern.

Investments in out-of-home delivery are being confirmed, with an expansion of the PUDO (pick-up and drop-off) network and numerous interventions on company fleets—from vehicle upgrades to route optimisation.

With five years remaining until the end of the 2030 Agenda for Sustainable Development, companies must move toward more sustainable, if not net-zero, alternatives. Soon, the "green" factor will become a consumer differentiator alongside delivery performance.

Shifting Expectations of European Consumers and Impacts on the Last Mile

Consumer expectations in the age of e-commerce are evolving rapidly and are directly influencing last-mile delivery strategies.

In Europe, customers are now more demanding in terms of delivery speed, flexibility, traceability, and sustainability, forcing logistics operators to adapt to remain competitive.

Short delivery times

The expectation for fast delivery has become the norm for many online shoppers.

Segments such as same-day delivery and even instant delivery within a few hours are among the fastest-growing.

However, not all countries show the same willingness to pay extra for these express services.

Convenience is another key factor: customers want deliveries at the time and place most convenient for them. This translates into a demand for flexibility—custom delivery window selection, the ability to reroute packages in transit to another address or pick-up point, click-and-collect options from nearby shops, etc.

Companies are responding by offering self-service interfaces to manage delivery preferences and by expanding available options (such as lockers and PUDOs).

USA	UK	Australia	Germany	Spain	Canada	France	Italy
65%	59%	59%	57%	53%	51%	49%	48%
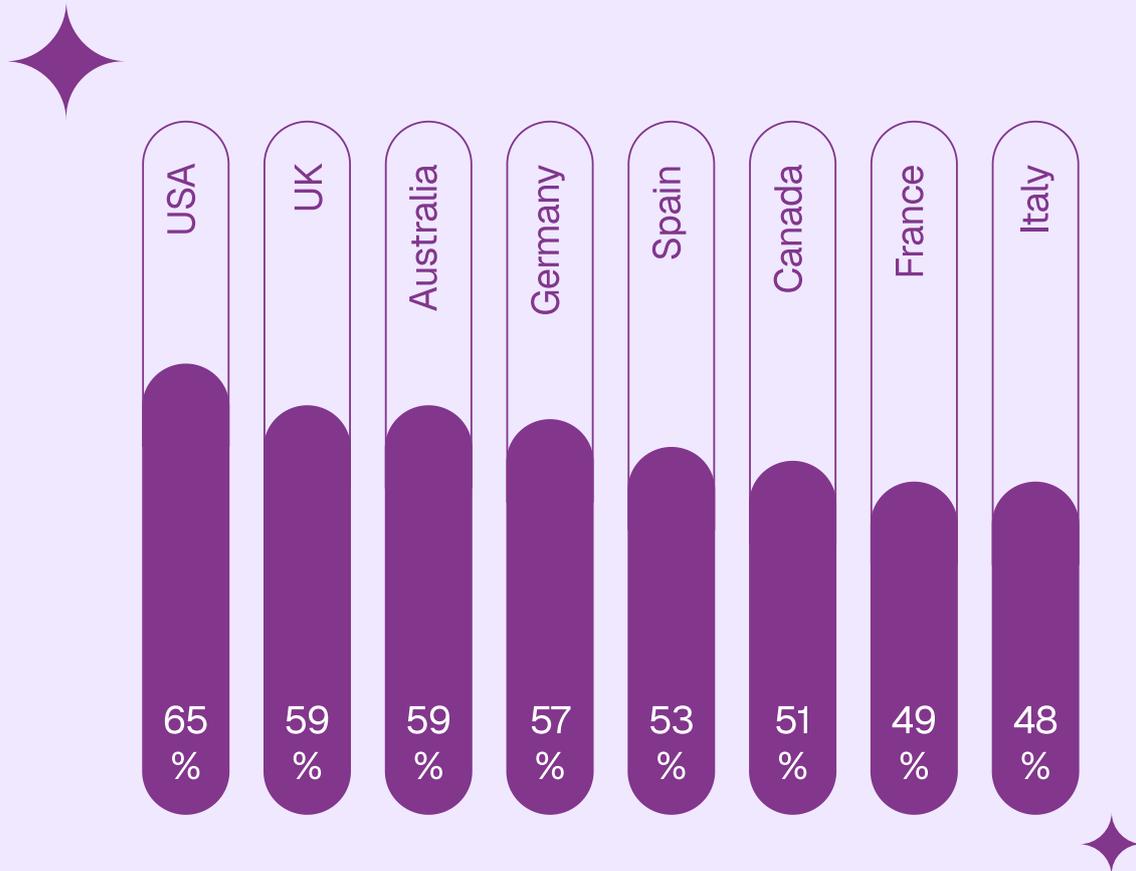
Source: Retail Economics, 2025
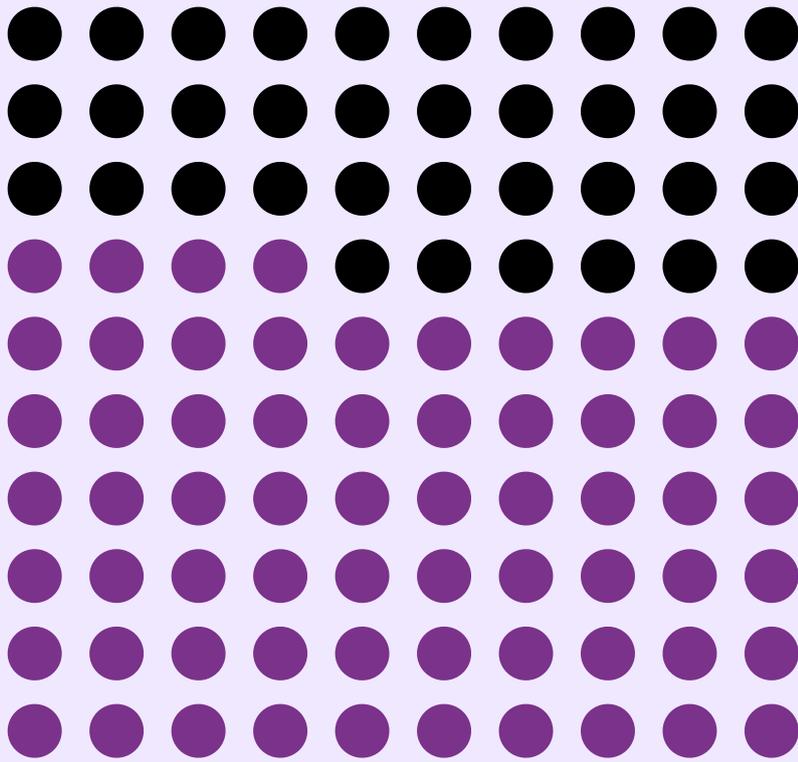
64%

of customers want real-time tracking for every delivery

Transparency and Control

The digital-native generation of buyers expects accurate and detailed tracking for every order.

Real-time courier tracking on a map, push notifications about shipment status, and precise delivery time windows are no longer a bonus— they're a baseline requirement for good last-mile service.

Recent studies indicate that about 2 in 3 customers (64%) in Europe want real-time tracking for every delivery.
Source: Europe Last Mile Delivery Market, 2023

Being able to "control" the process offers reassurance and reduces delivery anxiety.

As a result, couriers have invested in proactive communication platforms with recipients (SMS/app/email notifications, advanced web tracking pages) as well as solutions such as live GPS tracking of the driver as they approach.

This level of service, enabled by technology, is becoming the standard: those unable to offer it risk customer dissatisfaction and loyalty loss.

Trends in Last-Mile Delivery
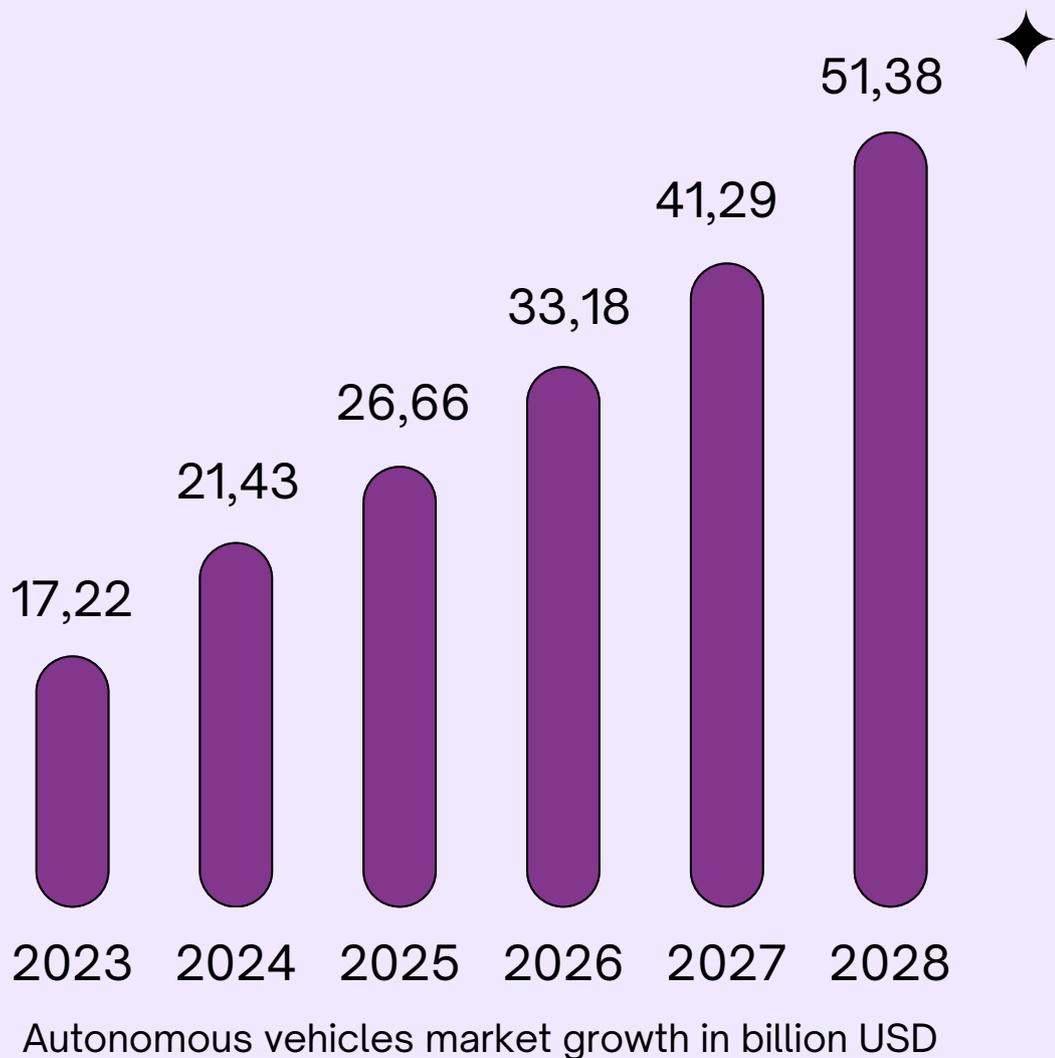
Autonomous Delivery Vehicles

An emerging trend in the sector is the adoption of autonomous vehicles for last-mile delivery.

According to Statista and Fortune Business Insights (2022), the global autonomous delivery market is expected to grow significantly in economic terms.

The integration of autonomous vehicles and drones into delivery operations promises to revolutionise the industry by improving efficiency and reducing operational costs.

This is because, by combining driving automation with GPS-based route optimisation, it becomes possible to:

- Speed up travel times
- Reduce distances by avoiding high-traffic areas
- Lower fuel consumption
- Address staff shortages, especially during peak periods

2023	2024	2025	2026	2027	2028
17,22	21,43	26,66	33,18	41,29	51,38

Autonomous vehicles market growth in billion USD

Route Optimisation Trends

Agile logistics refers to a company's ability to quickly adapt its logistics operations in response to market changes and customer needs.

This requires close integration across all supply chain players—including suppliers, manufacturers, distributors, and customers—facilitated by technologies like AI and efficient information flows.

Route optimisation is a core component of Agile Logistics.
Route optimisation involves planning transport routes to minimise costs, delivery times, and environmental impact while maintaining a high level of customer service.

Optimising routes can help companies:
- Reduce fuel consumption
- Lower environmental impact
- Accelerate deliveries and improve punctuality

Case studies from companies in the route optimisation field report that their clients have increased customer retention following the implementation of such systems.

Current challenges in this area

- Route optimisation often involves the use of autonomous vehicles, which are still in the early stages of adoption. They are **expensive and rely on algorithms that still need refinement**.

- For last-mile delivery, optimising transport from warehouse to destination may be enough. But what about companies using **multimodal transport**? From e-bikes to standard vans, today's algorithms are not yet able to effectively coordinate a multimodal mix.

- **Access to data**: without performance data, predictive algorithms cannot determine the best routes.

Companies are already moving to accelerate delivery times.

The average time has dropped from 5.8 days in 2021 to 3.8 days in 2022, and 2 days in 2025 (a trend largely accelerated by the pandemic).

[Source: Project44, 2023 | ShippyPro, 2025]

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Trends in Last-Mile Delivery

Microfulfillment for same day deliveries

According to 2023 Gartner Future of Supply Chain Survey, "Delivery speed (90% of days in 2022 (in this, respondents) and reliability (85% of respondents) remain the most important aspects of LMD, far surpassing other aspects such as flexibility, visibility or sustainability. Speed was the No. 1 aspect for 40% of survey respondents, while it was reliability for 48% of the participants."

Source: Gartner, Top Trends in Last-Mile Delivery Technologies, Oscar Sanchez Duran, Carly West, et al., 10 April 202 September 2024

Companies have already set in motion to accelerate delivery times. We have indeed moved from an average of 5.8 days in 2021 to 3.8 days in 2022 (in this, the pandemic has given a significant boost).

Despite everything, the need for greater speed is still growing: hence the birth of Microfulfillment. From the 250 centers in 2023, GlobalNewsWire predicts reaching 5600 by 2030 with the main market share occupied by the United States (50% of the centers).

5600
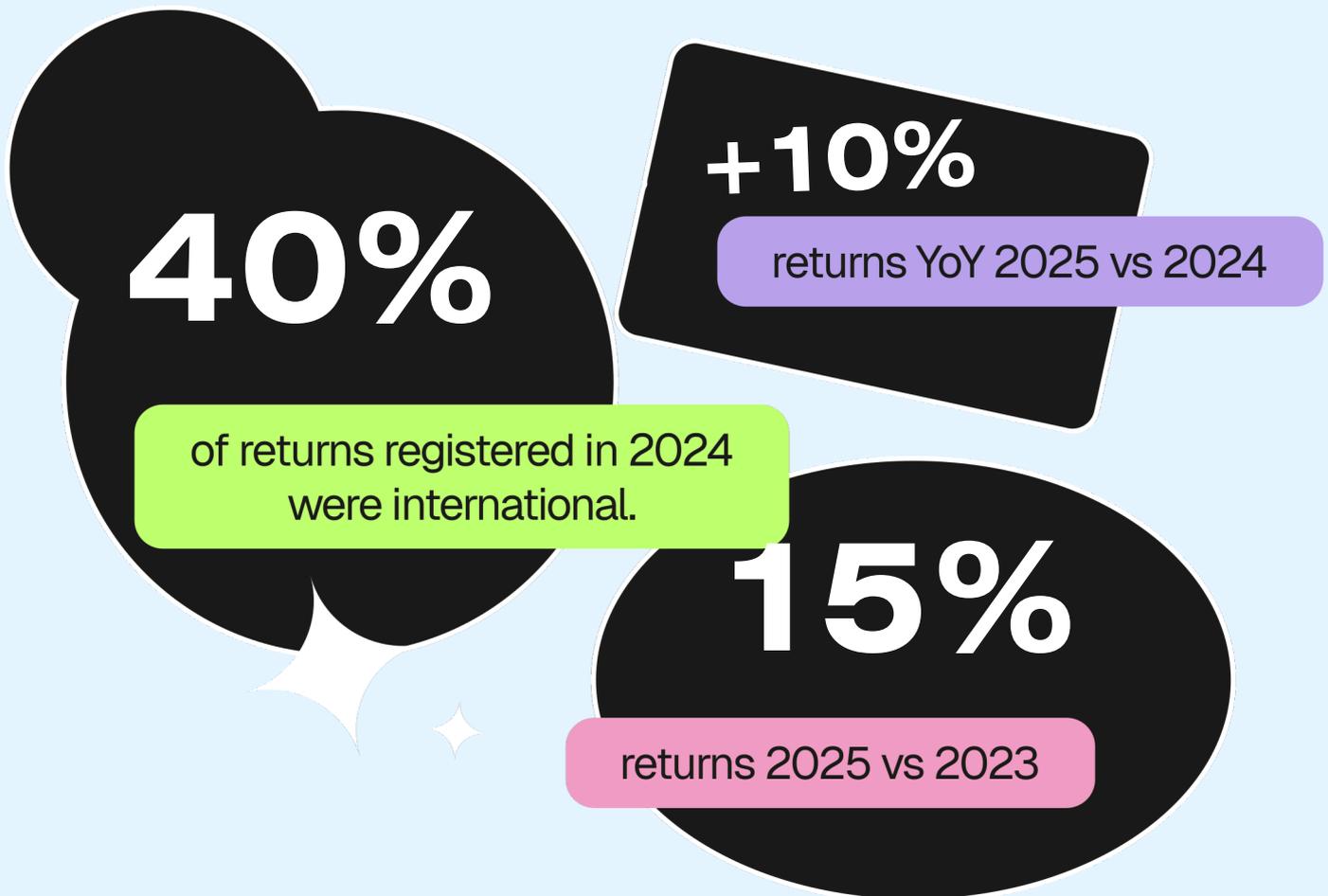Centers by 2030

250
Centers by 2023
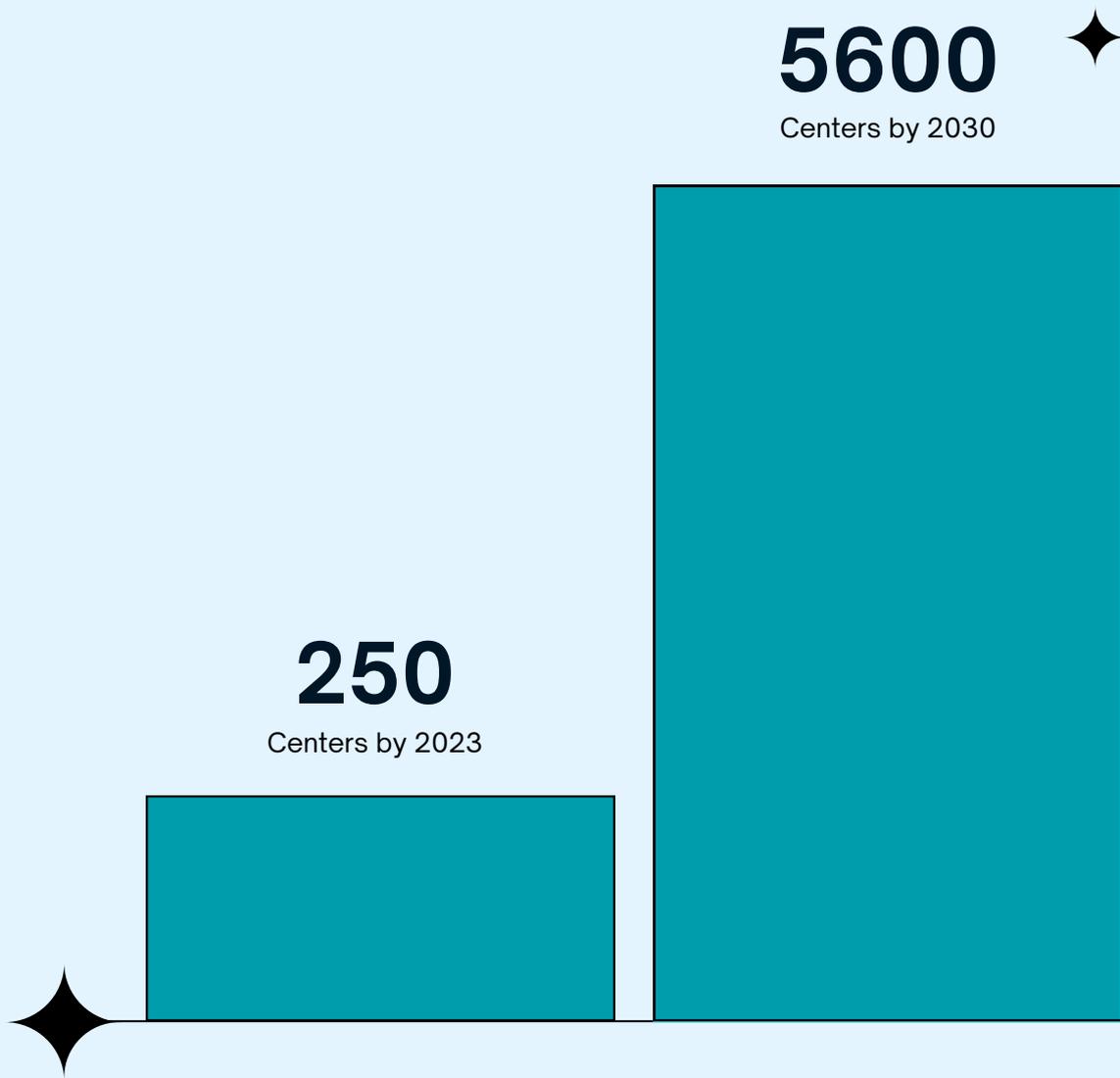
Reverse Logistics and Returns Management

It's now well understood: the purchase experience does not end with delivery, but continues into post-sale and return processes.

The post-sale phase includes customer support not only for handling potential issues, but also for maximising the value of the purchased product or service. Returns, however, are one of the most delicate moments and can easily break the thin thread that connects a brand to its customer.

For this reason, we've dedicated a section of the report to reverse logistics—that is, all shipment flows that return to the company.

Businesses are progressively expanding their target markets. National borders are no longer seen as a limit, but as just the starting point of a broader expansion project. Data shows that 4 in 10 returns are international—a sign of increasingly cross-border commerce.

40%

of returns registered in 2024 were international.

+10%

returns YoY 2025 vs 2024

15%

returns 2025 vs 2023

Return rate after online purchases in selected countries
Source: Mastercard Economics Institute, 2024

| Country	Rate
USA	10.4%
UK	18.3%
Spain	25%
Germany	20.5%
Canada	14.2%
France	13.4%
Italy	10.3%
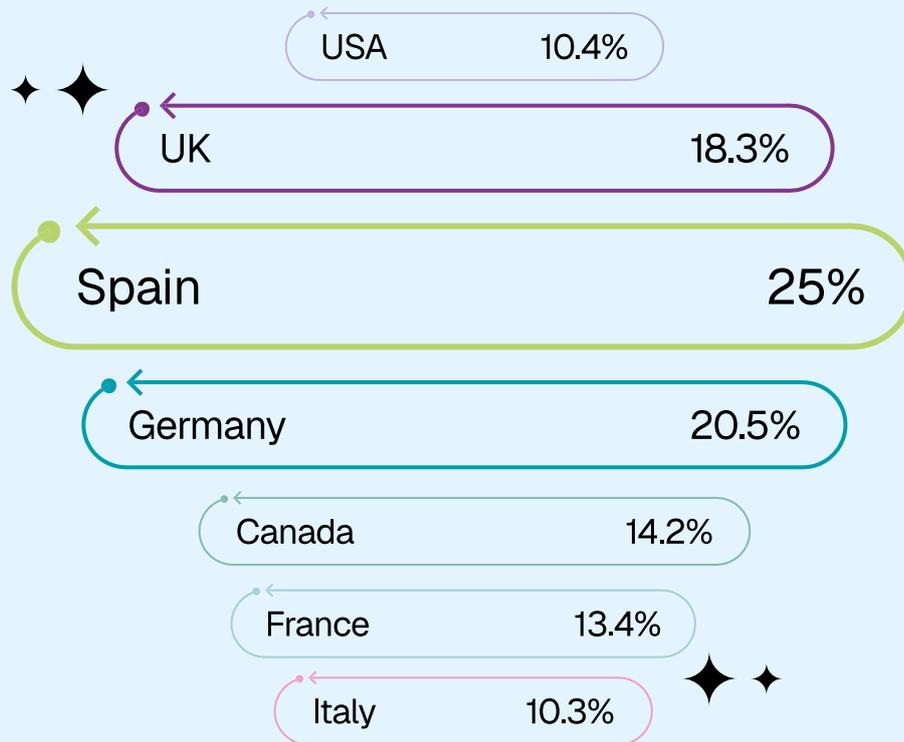
Trends in Returns and Reverse Logistics

Paperless Returns

One major issue with returns is the requirement for customers to print their own labels. As a result, paperless returns are becoming more common, allowing customers to use a QR code to initiate the return process.

In practice, the customer schedules the return pickup at a convenient location (this could be a locker or a PUDO). After initiating the return request, they receive a QR code which, once scanned by the courier, enables the courier to generate and print a label on the spot.

This simplifies the return process for the customer and reduces label printing errors.

France
45%

USA
45%

Spain
56%

UK
44%

Germany
44%
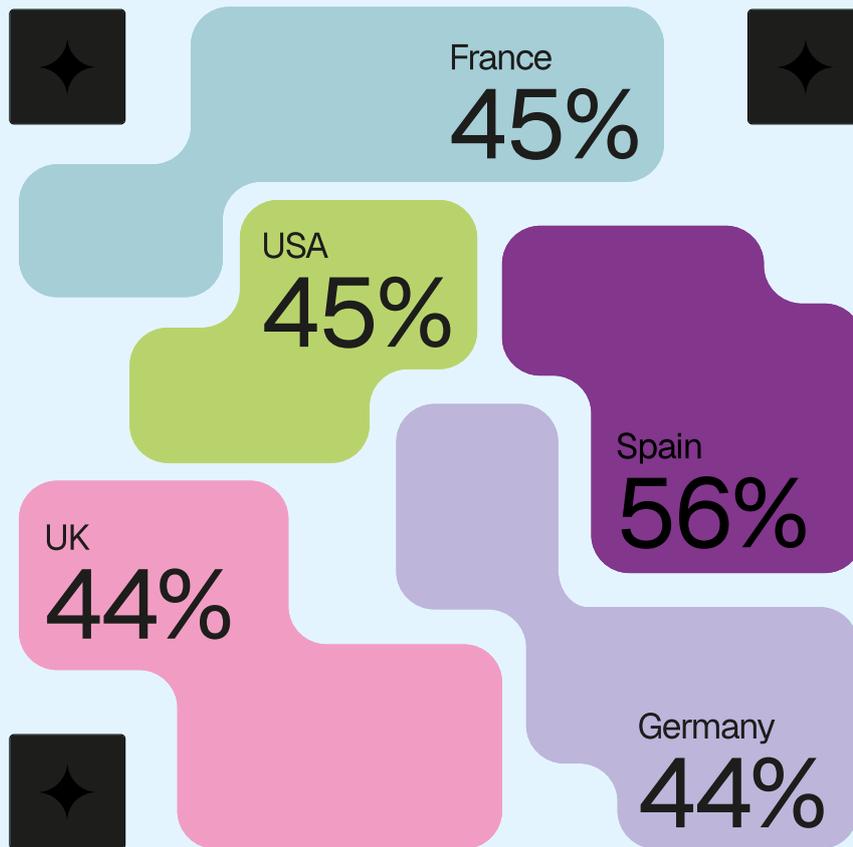
How many people want paperless returns?
Source: Appinio; Spryker, 2022

Why going "Paperless"?

Greater Operational Efficiency

Dematerialisation of documents speeds up logistics processes, reduces handling times, and improves information accuracy.

Eliminating paper reduces transcription errors and makes real-time data access easier. Advanced digital tools like APIs enable automated handling of shipments, tracking, and returns—streamlining the entire logistics flow.

Environmental Sustainability

One of the primary benefits of going paperless is reduced environmental impact.

Eliminating paper helps cut CO_2 emissions associated with the production and transport of physical documents.

An increasing number of couriers now allow returns without printed labels, making the process more sustainable and convenient for customers.

Regulatory Compliance

Using digital document management helps meet current legal requirements for data storage and protection.

Integrated platforms ensure documents are stored securely and accessible only to authorised personnel—reducing the risk of data loss or theft.

Compliance with GDPR and other regulations is simplified by digital systems that guarantee traceability and data protection.

Return Label in the Box

An alternative to paperless returns with QR codes is to include a pre-printed return label inside the package.

A US-based survey found that 65% of respondents were more likely to buy from brands offering a return label in the box as a return option.

Still, this method presents several challenges for companies (and sometimes even customers):

- **High costs and paper waste**: not all printed labels are used—in fact, most end up in the bin, generating vast amounts of paper waste

- **Increased returns**: ease of use encourages more returns, affecting logistics and inventory

- **Lack of data**: self-managed processes don't gather information about the return reason, limiting opportunities for improvement

Of course, there are notable benefits as well:

- **Maximum convenience for the customer**: no request or printing required, fewer steps = smoother user experience

- **Better cart conversion rates**: guaranteed easy returns reduce cart abandonment

- **Fewer support tickets**: fewer requests for return labels reduce workload for customer care teams

Aspect	Return label in the box	Paperless return
Customer experience	Seamless, no frictions	Good, with a few more steps
Direct costs	High (print, waste)	Variable, demand driven
Operational data	Limited, manual	Complete, tracked
Sustainability	Paper waste	Little to no waste
Logistics efficiency	Risk of errors, useless issuance	Digital check on internal tools

Gen Z	**30%**	✦
Millennials	**31%**	✦
Gen X	**27%**	✦
Baby Boomers	**22%**	✦
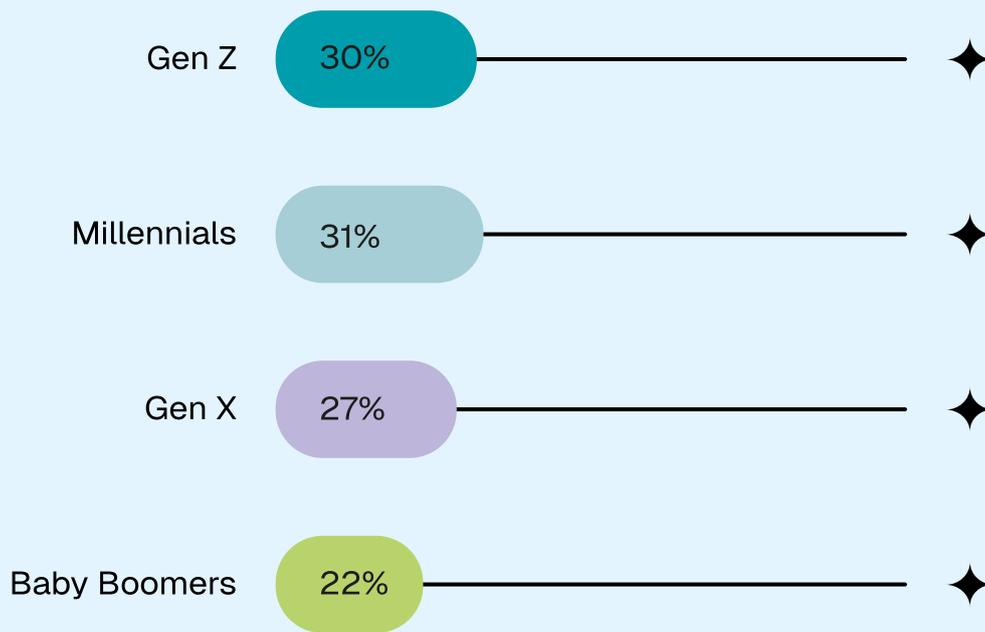
Willingness to pay for returns, by generation

Paid Returns

After years of extremely lenient return policies—leading to free returns becoming nearly standard in online commerce—we're now seeing a reversal: more and more European retailers are introducing **paid return policies**.

The main reasons are twofold: reducing operational and environmental costs, and discouraging bad practices by customers.

However, paid returns are not always well received. For instance, data from The Times shows that 60% of UK consumers would be likely to abandon a brand that charges for returns.

This reveals a delicate balance between economic sustainability and customer loyalty.

It's important to note that under EU e-commerce regulations, sellers must offer a 14-day right of withdrawal, but may charge the direct costs of return provided this is clearly communicated at the time of purchase.

This enables brands to create legally compliant paid return policies, as long as they are transparent and consistent with contractual terms.

Failed deliveries remain a costly inefficiency for businesses.

First failed delivery attempts account for 25% of total first deliveries. According to Censuswide, the average cost of a failed delivery is estimated at €14 in Germany, 17.2$ in the US, and £11.60 in the UK.

[Source: Fixing Failed Deliveries, 2021]

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Out-of-Home Delivery
Delivery happens everywhere

Out-of-home (OOH) delivery is a growing phenomenon that is gaining traction worldwide, country by country.

But where does all this success come from?

Let's start with a simple fact: failed deliveries remain a costly inefficiency for businesses.

According to Censuswide, the average cost of a failed delivery is estimated at €14 in Germany, 17.2$ in the US, and £11.60 in the UK.

OOH delivery is currently one of the most effective solutions for reducing failed deliveries while also helping to lower the ecological footprint of businesses.

Market outlooks confirm a strong growth trend for the OOH model. The volume of parcels delivered via OOH is expected to increase much more rapidly than home deliveries in the coming years.
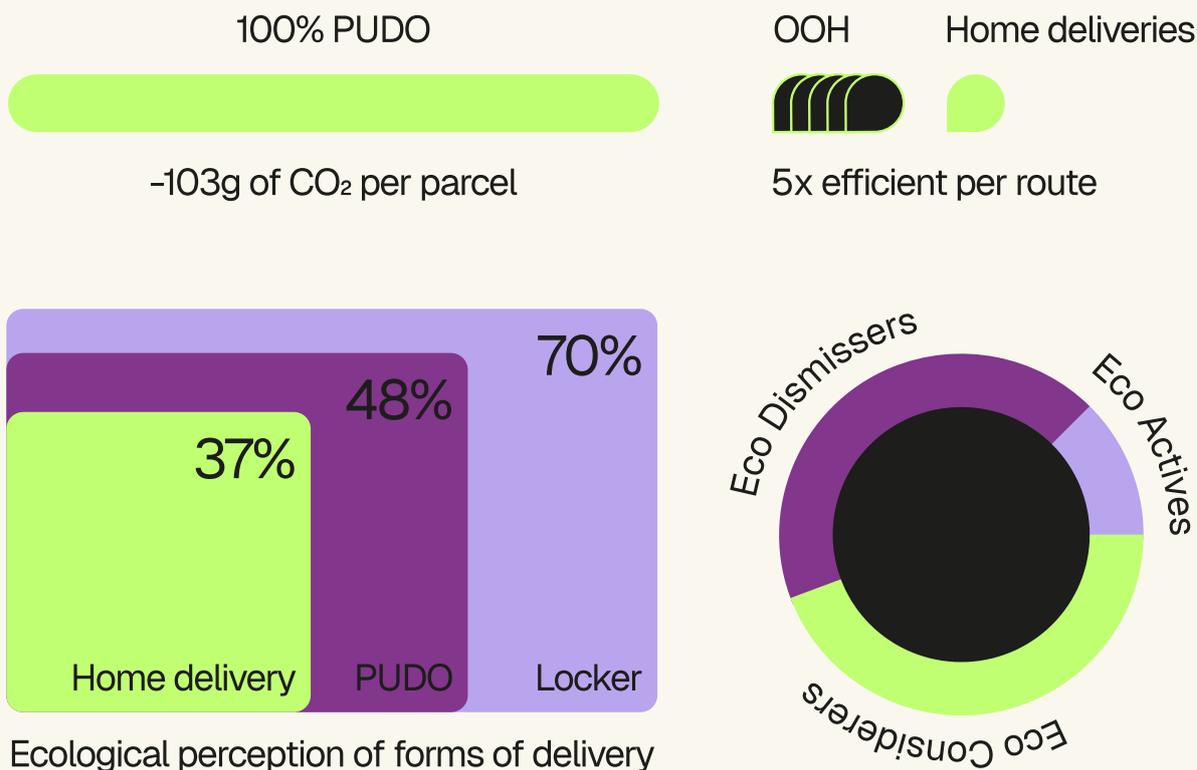
One study across four major markets (Germany, France, Poland, Italy) estimates an increase of 1.3 billion OOH parcels by 2027, compared to "only" 200 million additional home deliveries in the same period (McKinsey).

In terms of revenue, this would translate to around €9 billion generated by out-of-home deliveries in 2027.

Notably, OOH growth spans both B2C and some B2B applications. For example, many C2C marketplaces and online retailers encourage the use of pick-up points for sending goods between individuals or to partner stores—benefiting from lower costs and greater security.

In business settings, external delivery points can be used to send materials or spare parts to field technicians, or to optimise in-store distribution (such as click & collect).

Locker
40,6 %

OOH shipments / total shipments:
26 %

Parcel Shop
59,4 %

100% PUDO

–103g of CO₂ per parcel

OOH **Home deliveries**

5x efficient per route

37% Home delivery
48% PUDO
70% Locker

Ecological perception of forms of delivery

Eco Dismissers
Eco Actives
Eco Considerers

Environmental Impact and ESG Considerations

One of the main drivers behind OOH delivery adoption is its potential to **improve the environmental sustainability of last-mile logistics**, aligning with both company ESG (Environmental, Social, and Governance) goals and public policies.

Various studies and pilot programmes have shown that the OOH model, by consolidating deliveries, **reduces the carbon footprint per parcel** compared to individual home deliveries. It is also perceived as a greener delivery method.

From a CO₂ emissions perspective, the advantage stems mainly from the shorter total distances travelled by delivery vehicles. A van dropping off dozens of parcels at a single OOH stop generates fewer kilometres and fewer stops than one delivering to each individual address.

Operational estimates suggest that delivering 50 parcels to a single OOH point instead of 50 separate addresses can reduce CO₂ emissions by about 25% per route (DHL).

When scaled up, the impact is considerable. In an extreme scenario, switching to **100% OOH deliveries by 2032** (even with diesel vehicles) could result in **savings of about 103 grams of CO₂** per parcel compared to the current status quo. Beyond CO₂, there are additional benefits in terms of local air pollution and urban traffic.

Fewer stops and fewer vehicles required mean lower fuel consumption, **fewer NOx/PM10 emissions**, and less congestion in city streets. Fewer vans double-parked for deliveries means smoother traffic flow—an important benefit in Europe's crowded urban centres.

OOH delivery also aligns with **soft mobility solutions**: for example, a cargo bike can stock a cluster of lockers in a pedestrian zone, reducing the need for vans in the "urban mile".

Many pilot projects across Europe are integrating lockers with last-mile logistics hubs and electric deliveries to **maximise emissions reduction**.

Cross-Border Shipping: When Global Trade Gets Complicated

The international shipping landscape is undergoing an unprecedented transformation.
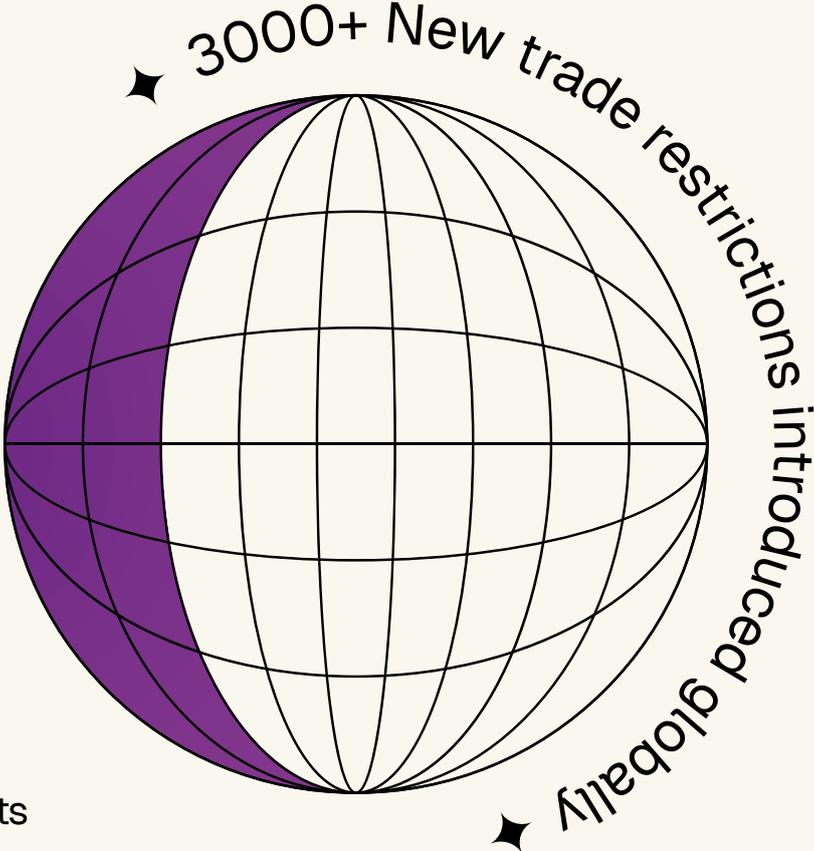
The complex geopolitical scenario of recent years has had direct repercussions on European supply chains and international shipping flows.
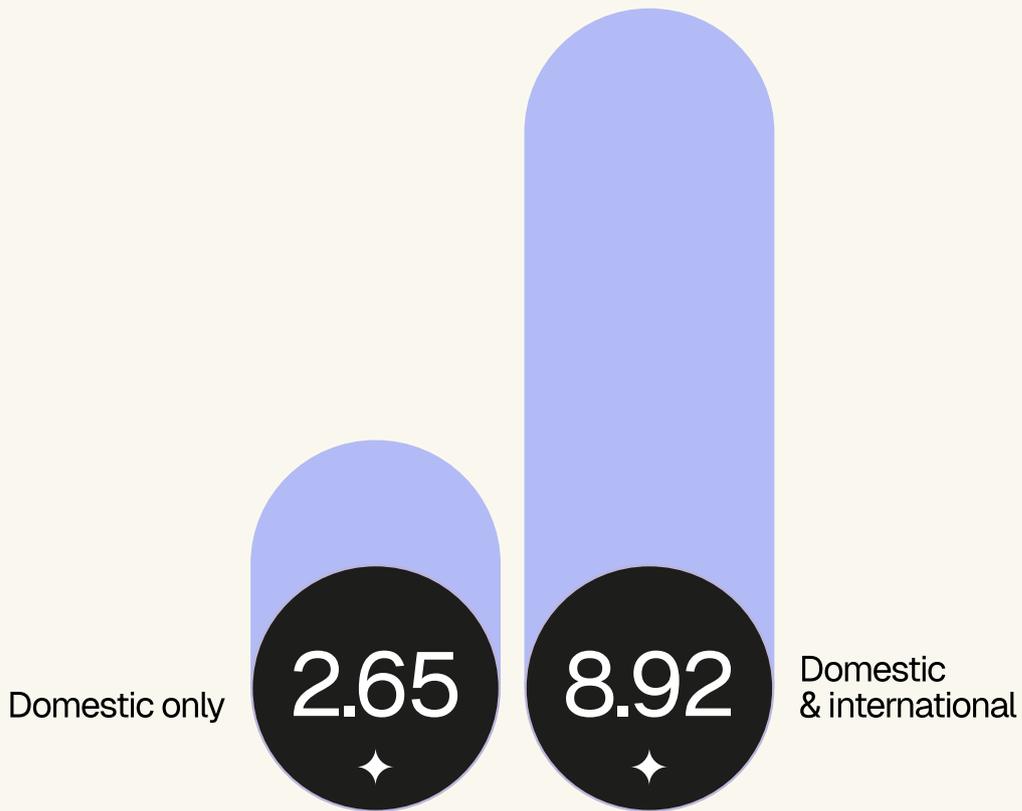
Events like the war in Ukraine have disrupted key logistics routes (such as the blockade of Black Sea ports), forcing many companies to reconfigure their supply chains.

Instability in the Middle East (e.g. the Israel–Hamas conflict) and fears of crises in Asia (such as a potential China–Taiwan clash) add further uncertainty, threatening vital maritime corridors like the Taiwan Strait—through which nearly half of the world's container fleet passes.

These geopolitical factors are now recognised as primary challenges for supply chains, contributing to rising logistics costs, longer delivery times, and shortages of raw materials that sometimes halt production.

3000+ New trade restrictions introduced globally

25%
of total shipments are international

Domestic only 2.65   8.92 **Domestic & international**

Source: ShippyPro, 2025

Unsurprisingly, **geopolitical risk** has emerged as the most frequently cited reason for companies reshoring production to Europe, surpassing purely cost-driven considerations: the focus has shifted from efficiency to ensuring resilience and operational continuity.

For this reason, businesses shipping internationally often **partner with multiple couriers**, allowing them to adapt quickly to disruptions and maintain reliable service even as geopolitical uncertainties and logistical challenges evolve.

At the same time, the global climate of uncertainty has led to the proliferation of new trade barriers and protectionist measures: the number of trade restrictions introduced annually rose from around 650 in 2017 to over 3,000 in 2023—creating a more fragmented landscape for European companies to navigate.

How the International Landscape Is Changing: Cross-border trends

Resilience and Intermodality

A major theme is **supply chain resilience**. Recent disruptions—from the pandemic to conflicts—have shown the importance of having flexible, multi-route logistics chains.

In Europe, businesses are diversifying transport routes and modes: for instance, the war in Ukraine has led to greater use of land routes and alternative ports to bypass affected areas.

Another focus area is the expansion of the multimodal approach: companies are boosting integrated road–rail or road–sea links, investing in intermodal terminals, and forming partnerships with rail and maritime operators.

This provides alternative, more sustainable transport options that are less affected by road congestion or regulatory restrictions.

59% overall growth in Combined Transport between 2010 and 2023
Source: 2024 Report on Combined Transport in Europe, International Union of Railways

Customs Compliance and Paperless Solutions

Increasing regulatory complexity has made it crucial to invest in tools and expertise for customs and tax compliance. Companies are implementing specialised software to manage tariff classifications, automate duty calculations, and generate required documentation for each destination country—integrated directly with their ERP systems.

In parallel, investments are growing in training and hiring international trade experts: customs brokers, cross-border VAT specialists, export control professionals.

These roles help businesses stay up to date with evolving regulations and resolve bureaucratic issues quickly, avoiding penalties or shipment delays.

Customs red tape, especially for shipments outside one's economic area (e.g. outside the EU for Italy), remains a major barrier to international expansion.

However, the digitisation of customs procedures is no longer optional: the EU has long been pursuing a phased strategy to digitise export operations both at the national level and across the bloc.

Paperless management offers businesses several benefits, including:

- Cost reduction
- Fewer errors
- Faster processing
- Easier document archiving
- Environmental sustainability

Direct Injection

Direct injection is a shipping model in which goods destined for the same country are grouped together and sent directly to a distribution centre within that country.

Once cleared through customs, they are then sorted and delivered to final customers by the national courier.

Many logistics companies are rethinking their European distribution networks—investing in new strategic hubs and upgrading existing infrastructure.

The goal is to bring products closer to their end markets and reduce both physical and administrative distance in cross-border deliveries.

For example, this may involve establishing fulfilment warehouses in multiple EU countries to serve local orders without cross-border shipping.

Investments are also being made in customs storage capacity (such as bonded warehouses and fiscal depots) at key entry points, allowing goods to be pre-cleared for faster EU-wide distribution.

Direct injection offers several benefits:

- Faster delivery times
- Reduced warehousing costs
- Lower transport costs
- Less risk of damage
- Reduced environmental impact
- Greater customer satisfaction
- Time and admin resource savings
- Simplified market expansion

Automation and End-to-End Visibility

Investment is rising in advanced digital technologies to optimise cross-border operations. Logistics providers are adopting IT platforms and data analytics tools to gain end-to-end shipment visibility and make real-time, informed decisions.

IoT sensors and telematics systems are widely used to track goods in transit, and AI algorithms are being deployed to optimise routes, forecast demand, and proactively manage disruptions.
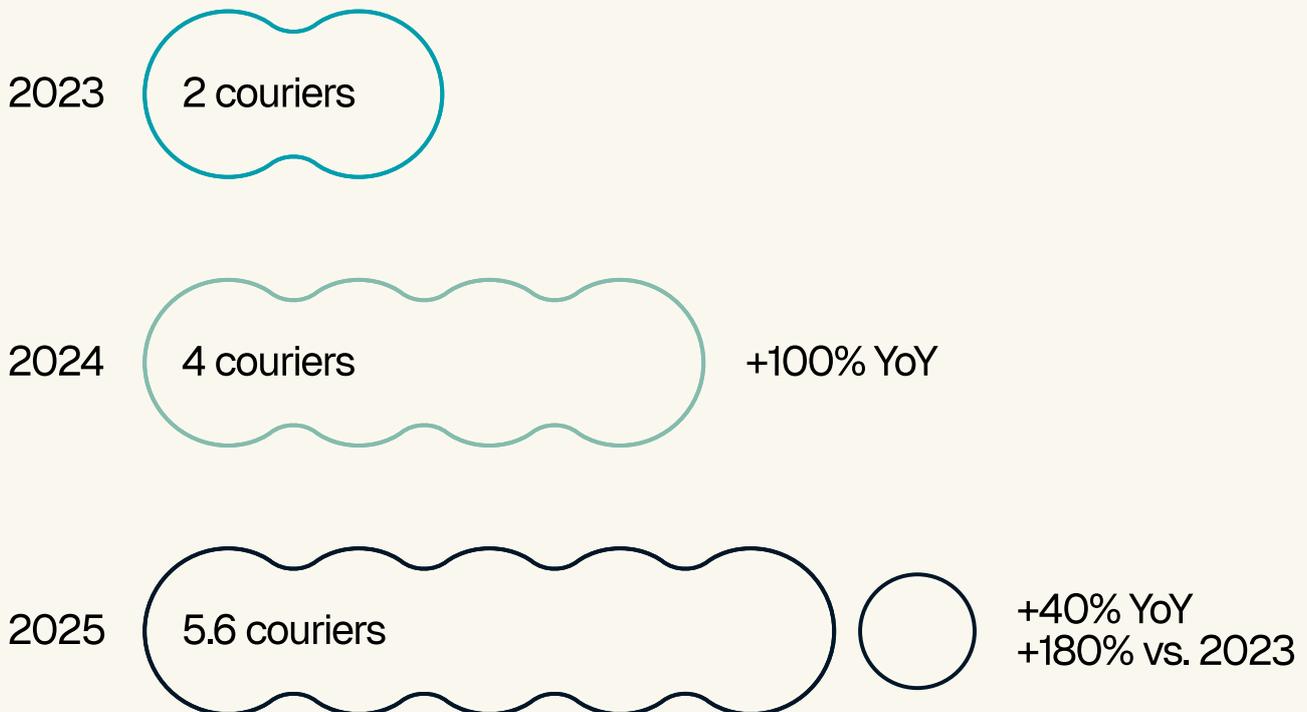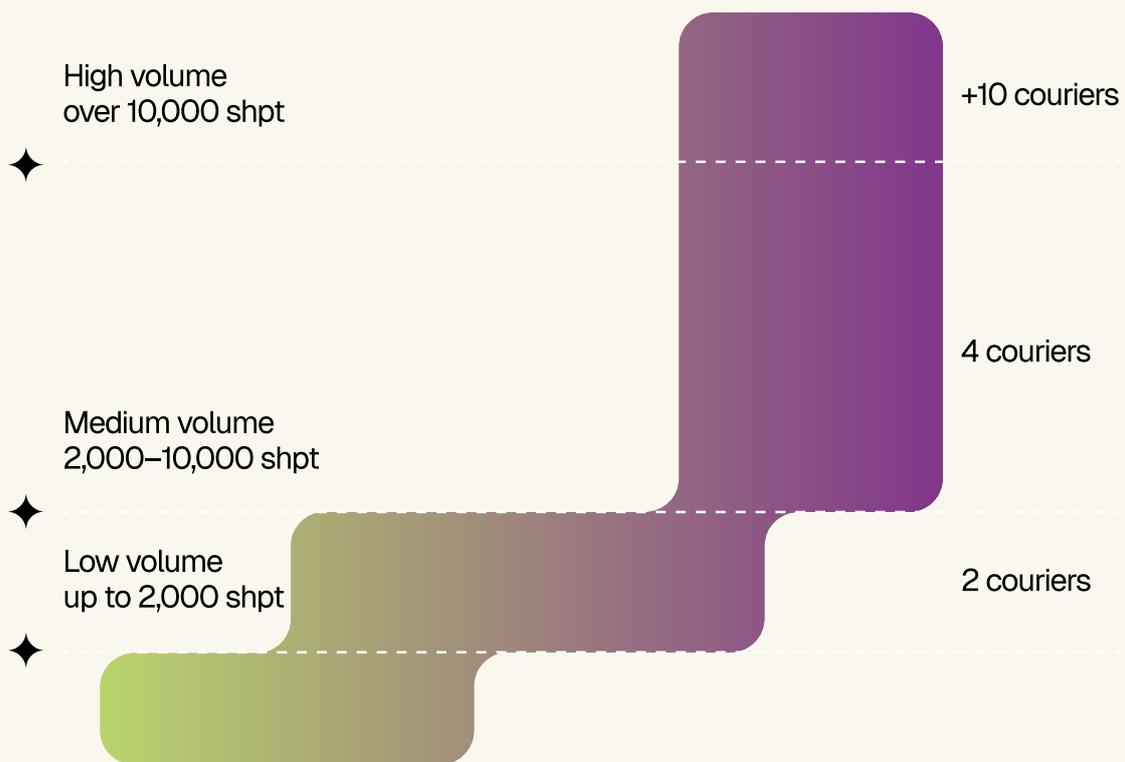
Multicourier Integrations
A strategic pillar for EU logistics

Multicourier integrations—digital solutions that allow businesses to manage shipments with multiple couriers through a single platform—are becoming a strategic pillar for logistics in Europe.

In a context of moderate but steady market growth, and with e-commerce expanding rapidly, more and more companies are adopting multicourier platforms to optimise costs and enhance operational flexibility.

By monitoring our clients' courier connections, we have observed a consistent year-over-year increase in the average number of integrations since 2023.

2023   2 couriers

2024   4 couriers   +100% YoY

2025   5.6 couriers   +40% YoY
+180% vs. 2023

High volume
over 10,000 shpt

+10 couriers

4 couriers

Medium volume
2,000–10,000 shpt

Low volume
up to 2,000 shpt

2 couriers

Benefits of a Multicourier Strategy

Optimised Shipping Costs

A multicourier system allows for automated comparison of rates and delivery times across operators for each shipment. This means every parcel can be routed via the most cost-effective or efficient courier available at that moment, based on business rules.

This dynamic courier selection can lead to substantial savings. Among our client case studies, we've identified savings ranging from 10% to 30%, depending on the sector and project.

Moreover, the use of consolidation and injection points—where shipments bound for the same area are grouped and forwarded as pallets within the local courier's network—is streamlined by multicourier software, bringing further economies of scale.

Greater Network Capacity and Resilience

Having multiple couriers available simultaneously increases total shipping capacity and reduces dependency on any single provider.

In cases of demand spikes or operational issues with a courier (e.g. strikes, hub saturation, delays), the company can reroute part of the volume through alternative couriers—still ensuring delivery to customers.

This makes the supply chain more resilient to disruptions.

Standardisation and Process Automation

Multicourier solutions enable companies to standardise shipping procedures, regardless of which courier is used.

Warehouse staff follow the same workflow every time (print label, apply tracking, send confirmation), and the system automatically translates the data into the required format for each specific courier.

In organisations operating across multiple sites or countries, this ensures that all branches follow consistent shipping policies (e.g. insurance, signature on delivery, cash-on-delivery handling), regardless of the local couriers in use.

Automation also reduces errors: labels and documents are generated automatically with the correct data, avoiding manual transcription mistakes.

Tasks that were once manual—such as entering shipment details into portals, calculating costs, or sending customer notifications—are now executed touchlessly by the system.

This streamlines operations and frees up human resources for higher-value tasks.

Trends in Multicourier Shipping
Integration with Multicourier Shipping Platforms

The implementation of integrated platforms for managing multicourier shipping is essential to optimise operational efficiency and enhance the customer experience.

These platforms enable businesses to manage all their couriers through a single interface, simplifying complex processes and reducing manual errors.

Key advantages include:

- **Data centralisation**: Access to real-time information on shipments, rates, and courier performance.
- **Process automation**: Automatic generation of shipping labels, customs documentation, and customer notifications.
- **Advanced analytics**: Use of business intelligence tools to monitor KPIs, optimise costs, and improve service quality.

Dynamic Pricing Models

Dynamic pricing is a pricing strategy where shipping rates are adjusted based on variable factors such as:

- **Market demand**: volume of shipments required during a specific period
- **Transport capacity**: availability of vehicles and logistics resources
- **Operational conditions**: factors such as traffic, weather conditions, or unforeseen events
- **Competition**: rates offered by other couriers or changes in competitor strategies

In the context of multicourier shipping, dynamic pricing allows businesses to select the most suitable courier based on real-time conditions (including peak periods), optimising both delivery times and costs.

Implementing dynamic pricing models in multicourier logistics presents significant opportunities to improve operational efficiency, reduce costs, and boost customer satisfaction.

However, it also requires investment in technology, a company culture open to innovation, and close collaboration with logistics partners.

1/2 of logistics firms do not yet systematically analyse their data, and 3/4 do not utilise AI.

Only around 50% of transport companies currently use basic analytics in their operations, and just 25% are already leveraging advanced AI capabilities.
At the same time, trends are accelerating rapidly: many companies are planning investments in data and AI platforms to close this gap in the coming years.

[Source: YouGov, 2024]

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Data Analytics and AI Predicting the future with data? We're just getting started

The adoption of data analytics tools in the European logistics sector is growing rapidly, though there is still room for development—especially among smaller businesses.

However, adoption rates rise significantly among large enterprises, showing that major players are investing heavily in these solutions.

13.5% of EU companies (with at least 10 employees) report using artificial intelligence technologies.

Over **41% of large European enterprises** are already using AI.
Source: European Commission

This **size-based gap** is particularly evident in logistics, where transport giants integrate big data platforms and proprietary algorithms, while many logistics SMEs remain at an early stage of digitalisation.

This gap may further widen the competitive advantage of larger players, potentially leading to **greater market concentration**.

Focusing specifically on the **Transport and Logistics sector**, adoption rates of analytics and AI are improving year by year.

These findings highlight significant untapped potential: Half of logistics firms do not yet systematically analyse their data, and three-quarters do not utilise AI, often relying instead on traditional management systems.

At the same time, trends are accelerating rapidly: many companies are planning investments in data and AI platforms to close this gap in the coming years.

The Big Data in Logistics market was valued at USD 4.3 billion in 2023 and is projected to grow at a CAGR of over 21.5% between 2024 and 2032.
Source: Gm Insights

It's worth noting that **data integration remains a challenge**: according to experts, more than three-quarters of companies struggle to fully unify their logistics information systems (orders, warehousing, transport, planning), **still operating with siloed data**.

This is driving the **adoption of end-to-end unified platforms**, as organisations with integrated databases and cross-functional analytics (from planning to execution) achieve 2–3 times higher ROI compared to those using disconnected tools.

In summary, we're witnessing two converging forces in Europe:
- On one side, **growing awareness of the benefits of data analytics** and an increasing number of pioneers gaining competitive advantage
- On the other, the **need to overcome obstacles** such as high initial costs, lack of internal expertise, and fragmented systems

Implementation costs are in fact the most cited barrier to adopting new technologies, followed by concerns about disruptions to existing services and the shortage of analytical skills among staff.

Nonetheless, the trajectory is clear: advanced analytics is becoming a core part of modern logistics in Europe, and **adoption is expected to accelerate between 2026 and 2030**, as off-the-shelf solutions and specialised training become more accessible.

Trends in Shipping Intelligence

Low-Code / No-Code

In the context of shipping KPI monitoring, low-code and no-code solutions are emerging as game-changing tools for implementing advanced analytics without requiring in-depth technical skills.

These platforms allow business users, even those with no programming background, to create customised applications, dashboards, and reports for analysing and visualising data—logistics-related and beyond.

In a sense, this marks a "democratisation of data", as it enables more horizontal access to information regardless of organisational role.

Using Data for Predictive Analytics

Supported by the spread of AI-based applications, the predictive analytics market is expanding rapidly across companies of all sizes—these tools are now much more cost-accessible than in the past.

What data is useful to collect? Common examples include:

- **On-Time Delivery Rate**: percentage of shipments delivered on or before the scheduled date
- **Transit Time**: average time taken for shipments to reach their final destination
- **First Delivery Attempt**: number of attempts required to successfully deliver an order
- **Cost per Shipment**: average cost incurred for each shipment
- **Damage Rate**: percentage of shipments damaged in transit
- **Exception Rate**: rate of shipments that experience delivery exceptions

Weekend included

Weekend excluded

67.3 hours
2.8 days

49.8 hours
2.07 days
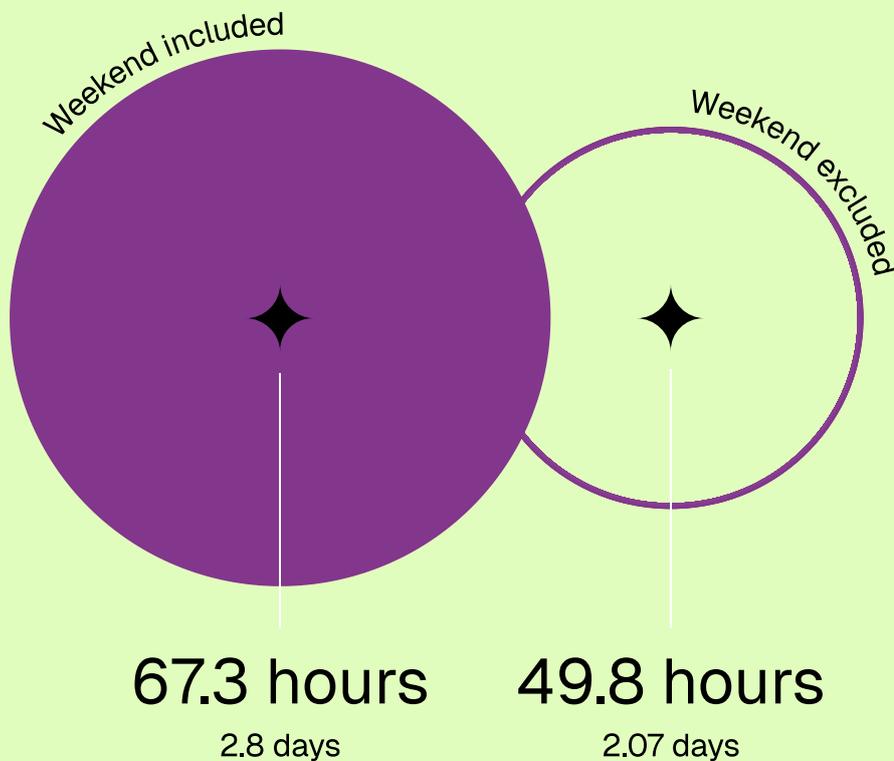
Average transit time
Source: ShippyPro 2025
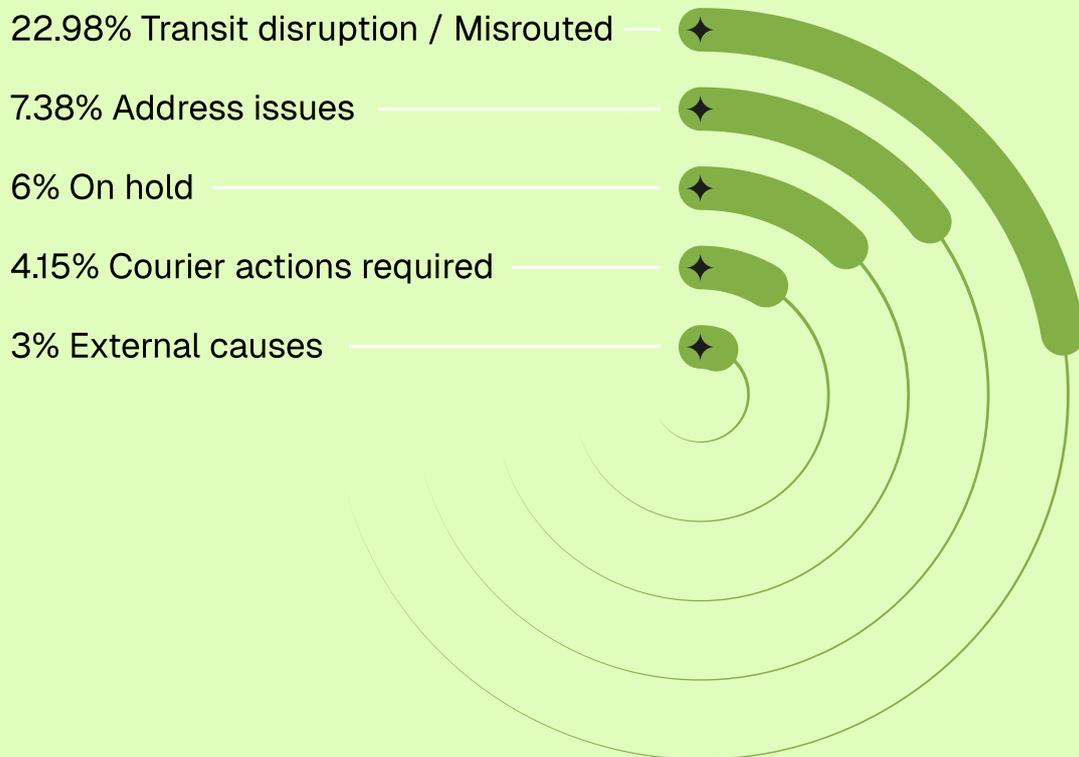
Shipping Exceptions

Shipping exceptions refer to unexpected events that disrupt the normal delivery process, such as delays, damaged goods, lost parcels, or incorrect addresses.

Addressing shipping exceptions has become increasingly important for businesses looking to build trust, reduce costs, and maintain a smooth, reliable delivery experience for customers.

✦ 6,64%

Average exception rate
Source: ShippyPro 2025

22.98% Transit disruption / Misrouted ✦

7.38% Address issues ✦

6% On hold ✦

4.15% Courier actions required ✦

3% External causes ✦

Green Shipping in Europe
For businesses or consumers?

"Green" shipping – that is, deliveries with a reduced environmental impact – is at the heart of a logistics transformation in Europe.

Both consumers and businesses are paying increasing attention to sustainable practices: from zero-emission last-mile deliveries to the decarbonisation of B2B shipments throughout the supply chain.

With the boom in e-commerce, European cities are becoming increasingly congested with delivery vans, driving innovation in urban distribution models.

At the same time, consumers are showing greater environmental awareness:

- About half of online shoppers say they are willing to wait at least one extra day for a more sustainable delivery
- 69% state that, in the past, the choice of a "green" delivery service has influenced their purchasing decisions (Sifted, 2023).

This suggests that offering eco-friendly delivery options can improve brand perception and customer satisfaction.

Businesses are therefore adopting greener last-mile strategies, balancing speed with sustainability:

Fully carbon neutral delivery services

Consolidated shipping for my orders

Consolidated shipping for orders in my area

PUDO

Locker

Slower but greener deliveries

Higher delivery fees

Source: Descartes; Sapio Research, 2023

Trends in Green Shipping

Zero-Emission Electric Vehicles and Micromobility

In metropolitan and densely populated areas, the use of e-cargo bikes and electric tricycles for parcel delivery is growing, helping to reduce traffic and CO_2 emissions.

These next-generation cargo bikes can carry several kilos in closed compartments, suitable for both home and light B2B deliveries (e.g. office supplies). In addition to cutting emissions, cargo bikes and electric scooters eliminate parking issues and are allowed to operate in city centres, where traffic restrictions mostly affect fossil fuel vehicles like cars and lorries.

These last-mile innovations are also encouraged by increasingly strict public policies.

Many European cities will introduce zero-emission zones (ZEZ) for commercial vehicles in the coming years. For instance, in the Netherlands, from 2025, at least 15 urban centres will ban access to diesel vans and lorries, allowing only electric or hydrogen vehicles within ZEZs (with another 14 cities expected to follow by 2030).

At the same time, the European Union has ruled that, from 2035, all new light vehicles sold (cars and vans) must be zero-emission.

These regulatory deadlines are pushing couriers to accelerate their green transition.

However, the cost challenge remains: electric vehicles and charging infrastructure require substantial investment, and not all businesses (especially smaller ones) can adapt quickly.

Nonetheless, the shift in consumer habits toward green delivery is rewarding forward-thinking brands, creating a competitive advantage for those innovating in sustainable last-mile logistics.

Digital Optimisation and Urban Micro-Hubs

European cities are experimenting with urban micro-fulfilment centres (small advanced logistics hubs) to bring stock closer to customers and shorten delivery distances.

This reduces dependence on long hauls from peripheral warehouses and improves speed, cutting both costs and emissions.

Additionally, couriers are investing in AI-powered routing software: smart algorithms calculate the shortest and most traffic-friendly routes, reducing kilometres travelled, fuel consumption, and emissions.

-20% fuel reduction thanks to transport route optimisation

This advanced planning, combined with "crowdsourcing" strategies (flexible networks of local on-demand couriers), enables businesses to maintain fast deliveries while minimising environmental impact.

Eco-Friendly Packaging and Reduction of Materials

The parcel is the first tangible element the customer sees, and it strongly influences brand perception.

80% of consumers believe that packages from online retailers are often excessively large or contain too much filler material.

For this reason, many companies are rethinking packaging with two main goals: **eliminating waste** (right-sized boxes, less unnecessary material) and using **low-impact materials**.

This means moving towards compostable mailers, biodegradable fillers (such as cornstarch packing peanuts that dissolve in water), and 100% recycled cardboard.

Several brands are experimenting with **reusable packaging** (boxes that the customer returns to be reused) to reduce waste.

This focus also pays off in terms of brand image: adopting eco-friendly packaging helps **improve brand perception and customer loyalty**, while potentially reducing costs (less material and volume = lower shipping expenses).

69%	68%	60%	55%	25%
Compostable packaging	Plant-based packaging	Compostable plastic	Paper-based cartons	Mixed
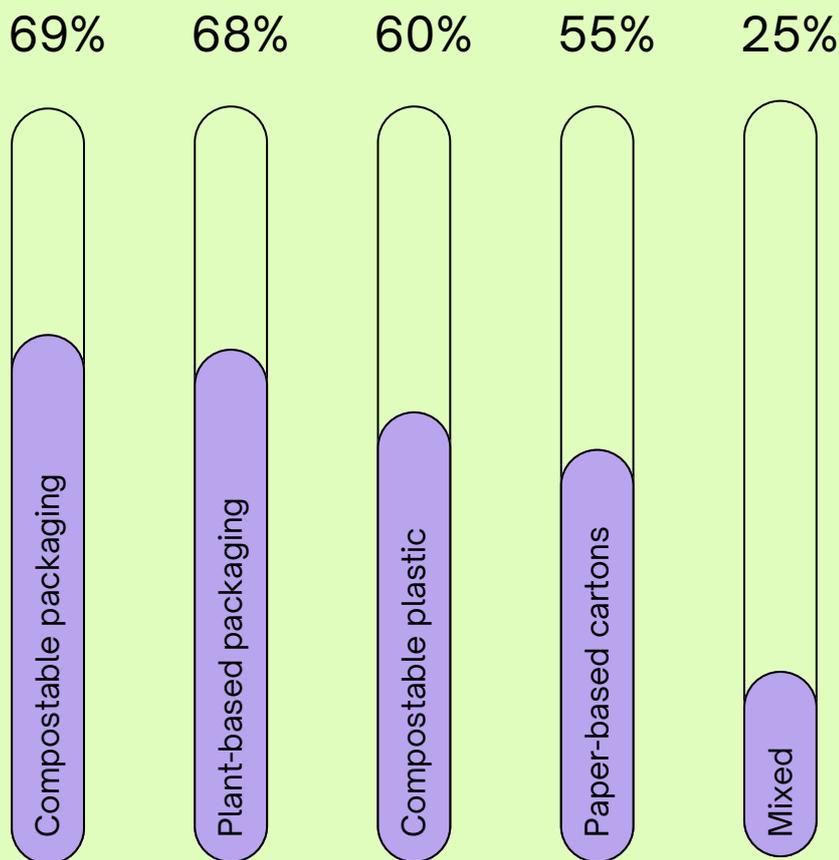
How sustainable consumers believe packaging is (worldwide)

Transforming B2B Flows

Even in B2B shipping (between businesses, throughout the production and distribution chain), a strategic shift toward more sustainable models is underway.

European manufacturers, distributors, and logistics providers are increasingly integrating sustainability as a key operational criterion—driven both by internal goals and the demands of commercial partners.

Among the green development areas:

- **For road transport**, B2B couriers are investing in clean-energy lorries. Medium-range electric truck trials are multiplying, as is the development of hydrogen-powered vehicles for long-haul routes. At the same time, research into biofuels such as **HVO (hydrotreated vegetable oil)** is gaining momentum.

- **Network optimisation and intermodality**: Reducing the environmental impact of B2B shipping isn't just about changing fuels—it also means finding strategies for greater shipment consolidation. Distribution centres are also going green: energy-efficient certified warehouses, solar panels, and EV charging stations are becoming the new logistics standard.

- A strategic trend is **horizontal collaboration** between companies to share logistics capacity and reduce empty runs. In Europe, platforms are emerging to connect multiple shippers and producers for **truck co-loading**, maximising efficiency (fewer total lorries for the same volume of goods).

One telling figure: around **one-third of European companies now include specific environmental targets in their logistics supply contracts**, requiring partners to meet them (a 32% increase in 2024 vs 2023 and 28% in 2022).

Moreover, over half of businesses now include penalty clauses or even the right to terminate agreements if logistics providers fail to meet agreed sustainability targets.

In parallel, regulations such as the new EU CSRD directive **require large companies to report even indirect supply chain emissions** (Scope 3), making the environmental footprint of B2B shipping more transparent.

Faced with changes driven in part by governments and in part by the market itself, companies must balance sustainability with efficiency: they need to ensure that green efforts do not excessively compromise operating costs or service levels.

B2B logistics in Europe is embracing sustainability more strategically, but will need to overcome major financial and technological barriers.

Still, the path is clear: the EU's climate goals— carbon neutrality by 2050—and market pressure are forcing the entire sector to innovate, opening the door to new business opportunities (from zero-emission transport as a service to new markets for green tech providers).

The Impact of AI on Logistics and Supply Chain Management

The ability of AI to learn, analyze complex data and automate decisions has become crucial to addressing new global challenges.

In 2025, a sharp turn is expected: the percentage of companies that consider AI essential for the supply chain is growing dramatically, from less than 10% to almost 40%.

At the same time, the percentages of non-use, pilot projects and limited adoption are decreasing.

The trend shown indicates a growing awareness of the strategic value of AI, which from operational support is rapidly establishing itself as a central lever for logistics efficiency and competitiveness.

2022

2025

I don't use

Pilot

Limited adoption

Wide adoption

AI is essential
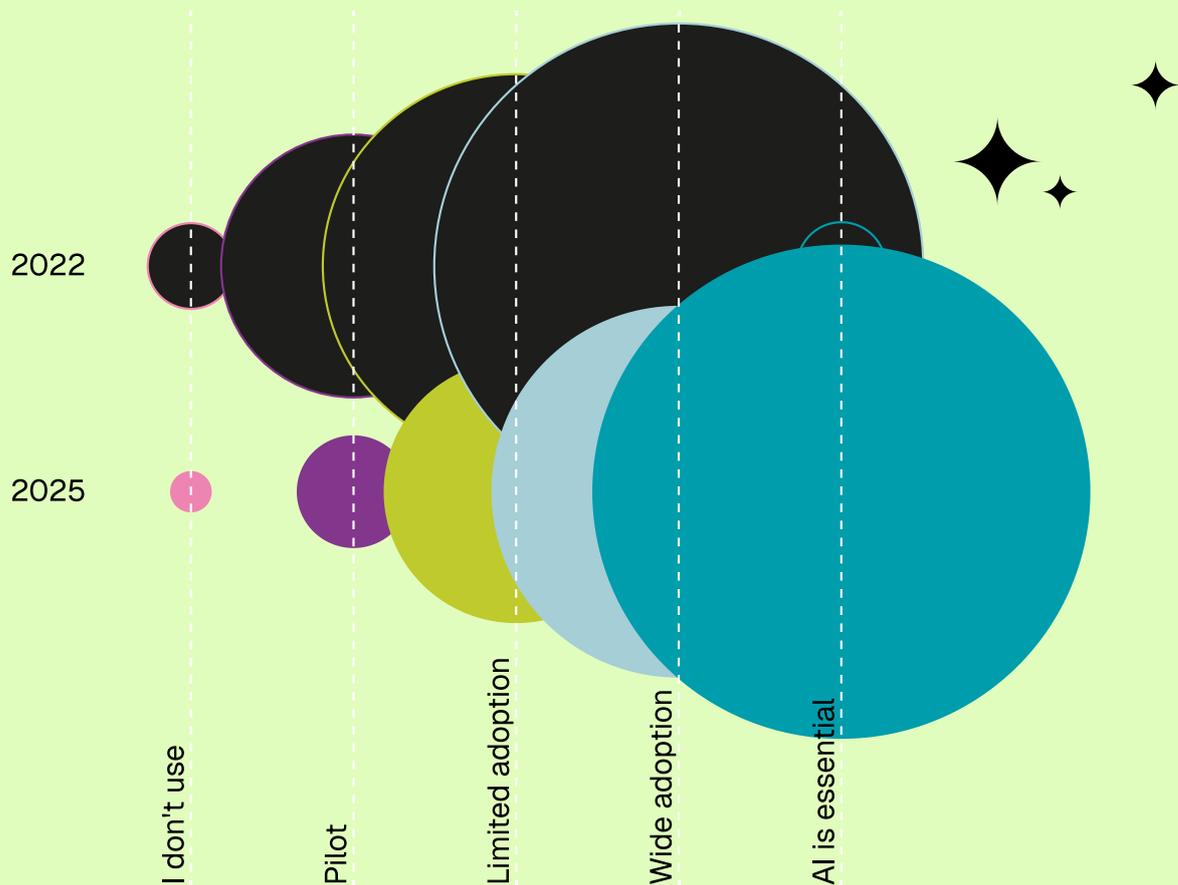
AI does not replace people, but enhances them.

It does not eliminate human intuition, but makes it more informed.
AI does not solve all problems, but offers new tools to address them with greater intelligence, efficiency and responsibility.

∞ ShippyPro

AI trends in logistics

Despite the media hype, the potential of AI to analyse big data, learn from experience, and provide proactive forecasting is very tangible for logistics.

For sector decision-makers, AI promises more resilient and agile supply chains in a context of continuous disruptions: analytics and machine learning tools already enable the anticipation of risks and bottlenecks and the optimisation of flows in real time, strengthening operational robustness.

In addition, AI is seen as a lever for sustainability goals: the systematic use of algorithms to optimise routes, loads, and consumption can make logistics cleaner and greener.

Here is an overview of new applications in the logistics sector.

Demand Forecasting

Demand forecasting (or demand planning) refers to the process of predicting and planning the demand for goods and materials to help companies remain as profitable as possible.

Without solid forecasting, companies risk accumulating costly and wasteful surpluses or missing sales opportunities because they failed to anticipate customer needs, preferences, and buying intentions.

Key factors in improving demand forecasting accuracy include:

- **Seasonality**: sales periods, peak season, Christmas, the seasons themselves—how consumer behaviour changes throughout the year
- **Competition**: how the market evolves and what other companies are offering
- **Trends**: sometimes a single event can change the perception (and thus demand) for a specific product
- **Geography and geopolitics**: different countries have different seasonality and consumption habits. Imagine having to sell swimsuits in Italy and Australia in December.

Working on demand forecasting means working on sales success and minimising stockouts.

By 2026, 95% of decisions will be made using automated, data-driven processes.

Source: AI in Supply Chain: How Supply Chains Benefit from AI, Gartner

AI adoption for Supply Chain and its benefits

- 15% Logistics costs
- 35% Inventory levels
- 65% Service levels

Source: Succeeding in the AI Supply-Chain Revolution, McKinsey 2023

Automated Robots

In recent years, autonomous mobile robots (AMRs) have emerged as one of the most significant innovations in warehouse logistics.
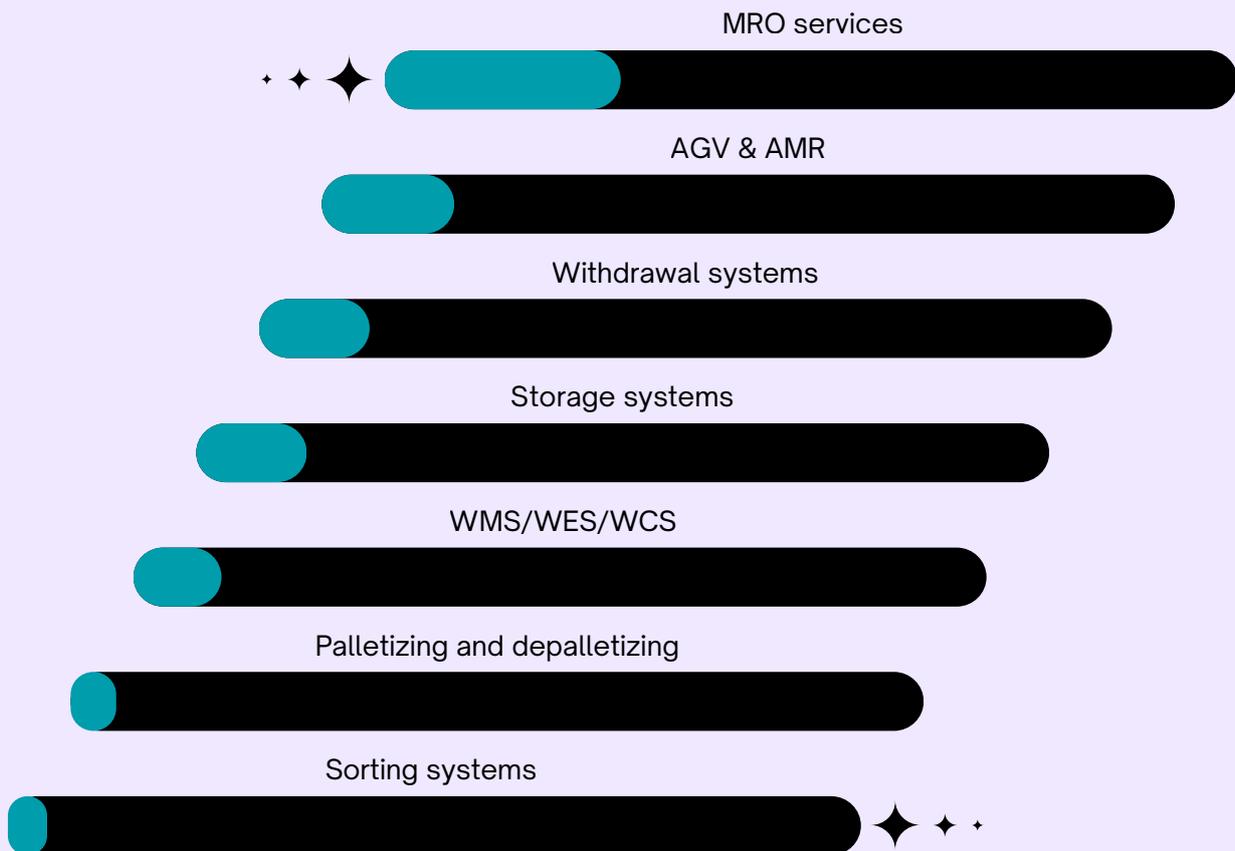
Unlike traditional AGV (Automated Guided Vehicle) systems, AMRs do not follow fixed paths; they are equipped with sensors, computer vision, and artificial intelligence that allow them to adapt dynamically to their surroundings.

AMRs are used to:
- **Transport items** between different warehouse areas (e.g. storage → picking → packing)
- **Assist operators** in handling loads
- **Interact with other automated systems** such as robotic shelving or picking stations

These robots can operate collaboratively with human workers, following them during picking activities and reducing unnecessary movement.

They can also avoid obstacles in real time and recalculate routes based on warehouse traffic congestion.

MRO services

AGV & AMR

Withdrawal systems

Storage systems

WMS/WES/WCS

Palletizing and depalletizing

Sorting systems

Automated Picking Systems

Today's automated picking systems go beyond simple mechanical arms programmed to perform repetitive movements.

Thanks to technologies such as machine learning, computer vision, and shape/code recognition, modern robots can identify, grasp, and manipulate items with impressive precision—even in dynamic, unstructured environments.

According to a Boston Consulting Group analysis published in 2024, warehouses that integrated automated picking systems recorded **efficiency increases of up to 60% compared to traditional manual methods**.

In particular, they saw a drastic drop in picking errors and reduced cycle times—especially in high-volume sectors like consumer electronics and fashion retail.

A notable example is the use of goods-to-person systems, in which shelving units are transported directly to operators by mobile robots.

This significantly reduces the need for staff movement and optimises operational flow.

In more advanced automation scenarios, robotic arms work in tandem with 3D cameras and deep learning software to automatically select items, adapting to different shapes, sizes, and materials.

Digital Twins and IoT

A Digital Twin is a virtual replica of a physical system (e.g. a warehouse, a machine, or an entire logistics network) that uses real-time data from IoT sensors to constantly reflect the state of real operations.

In practice, changes that occur in the facility (stock movements, temperatures, machine performance, etc.) are immediately mirrored in the digital twin, while analyses and simulations run on the virtual model can suggest optimal decisions to be applied in the real world.

This IoT–Digital Twin synergy creates a continuous feedback loop: IoT sensors act as the "nervous system" of the warehouse, collecting data from the field (load unit positions, stock levels, conveyor speeds, AMR status, environmental conditions...), while the digital twin acts as the "brain" processing this information to provide integrated visibility, forecasts, and optimisation commands.

69% of companies already report using digital twins to simulate and optimise complex problems in their supply chains.

Computer Vision

According to the DHL Logistics Trend Radar, computer vision will become an integral part of standard operating practices in logistics within five years, acting as a driver for more automated, efficient, and safer processes.

In less than a decade, the accuracy of computer vision systems in recognising and classifying objects has risen from 50% to over 99%, far surpassing human capabilities in many visual tasks.

Applied to warehouses, computer vision allows IT systems to interpret operational reality through images and video.

Deep learning algorithms analyse visual streams from fixed or mobile cameras and recognise objects, people, text, and relevant situations. A CV system can, for example, identify the presence of a pallet, forklift, or operator, distinguish them with high reliability, and locate them within the environment.

The ability to process visual data in real time makes it possible to streamline many processes (from goods receiving to picking) and eliminate downtime or duplicated activities. Moreover, tight integration with robotic systems and advanced automation enables a dramatic increase in productivity.

The Dawn of a New Industrial Revolution

There is a new energy flowing through European logistics.

It is not just the rustle of conveyor belts or the hum of electric motors: it is the sound of a sector rewriting itself, day after day.

Technologies such as Artificial Intelligence, digital twins, and automation are no longer distant promises, but concrete tools reshaping the way we move the world.

We are facing a change that goes beyond efficiency or cost reduction: it is a cultural transformation. Companies are no longer asking whether to innovate, but how to do it faster, more deeply, and in greater harmony with the planet.

Logistics, once invisible to the customer's eye, is now **a stage where brand reputation, partner trust, and commitment to a sustainable future are all at stake**.

In this scenario, those leading the change are not merely logistics operators or managers: they are pioneers. Every decision, every investment, every new solution adopted is a building block in the creation of a more connected, resilient, and responsible system.

As with the great revolutions of the past, those able to read the signs and act with courage will have the privilege not of enduring the future, but of shaping it.

This is the dawn of a new Industrial Revolution.

And logistics is no longer the silent backbone of the economy: it is the beating heart that drives it forward.

ShAIping Shipping

AI & data lead the way.

ShippyPro

REPORT 2025–2026