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Analysis of international FTL corridors

Study of bottlenecks in the trucking network
and opportunities for intermodal transport

The study “Analysis of International FTL Corridors” conducted by Contship based on data provided by Transporeon (a Trimble Group company), offers a complete overview of the main FTL corridors in Europe.

The report offers a detailed analysis of volumes, transit times, capacity, costs, and prices for road transport between Italy and the major European industrial hubs, providing a solid database for understanding market dynamics and supporting strategic decisions in the international logistics management.

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All infographics in this publication are sourced from Contship-Trimble, unless otherwise noted.

*Editorial and graphic design
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Prelude

In the last few years, the main European corridors have experienced significant volatility in the road transport market, with direct impacts on the efficiency and competitiveness of logistics chains.

Against this backdrop, at Contship, we decided to conduct a study to systematically compare data on the main FTL road corridors with intermodal solutions, with the aim of providing a comprehensive overview of the operational dynamics and economic factors that influence logistics between Italy and the main European industrial hubs.

The project therefore focuses on analysing the performance of road transport and market trends between Northern Italy and the main regions of Northern Europe (Germany, Benelux, and the United Kingdom). Volumes, transit times, capacity, and costs are analyzed in detail, highlighting how the availability of lorries and price pressures influence transport performance.

The data show that, although the majority of FTL deliveries are completed within 48 hours, available capacity has fluctuated significantly, with peaks in load rejection in certain strategic corridors. These dynamics make it increasingly urgent to evaluate multimodal strategies capable of ensuring the efficiency, reliability and sustainability of transport.

The study also highlights how rising road costs, linked to fuel, tolls, driver wages, and new environmental regulations, strengthen the economic case for intermodality.

Looking forward, despite the uncertainty surrounding the geopolitical and economic climate, we anticipate growth in the spot market. In our view, it will become increasingly crucial to **integrate road, rail, and low-emission solutions** to maintain competitiveness, optimize flows, and address the challenges presented by the growing complexity of the European and global markets.

Enjoy the read!

Cristiano Pieragnolo

Chief Commercial Officer – Contship



Analysis and structure of the sample

350.000 annual trips
Total FTLs analyzed

Analysis period
2021-2025

3 strategic corridors representing
around 10% of the European full-truckload (FTL)
road transport market were analyzed.

NORTHERN ITALY ↔ BENELUX

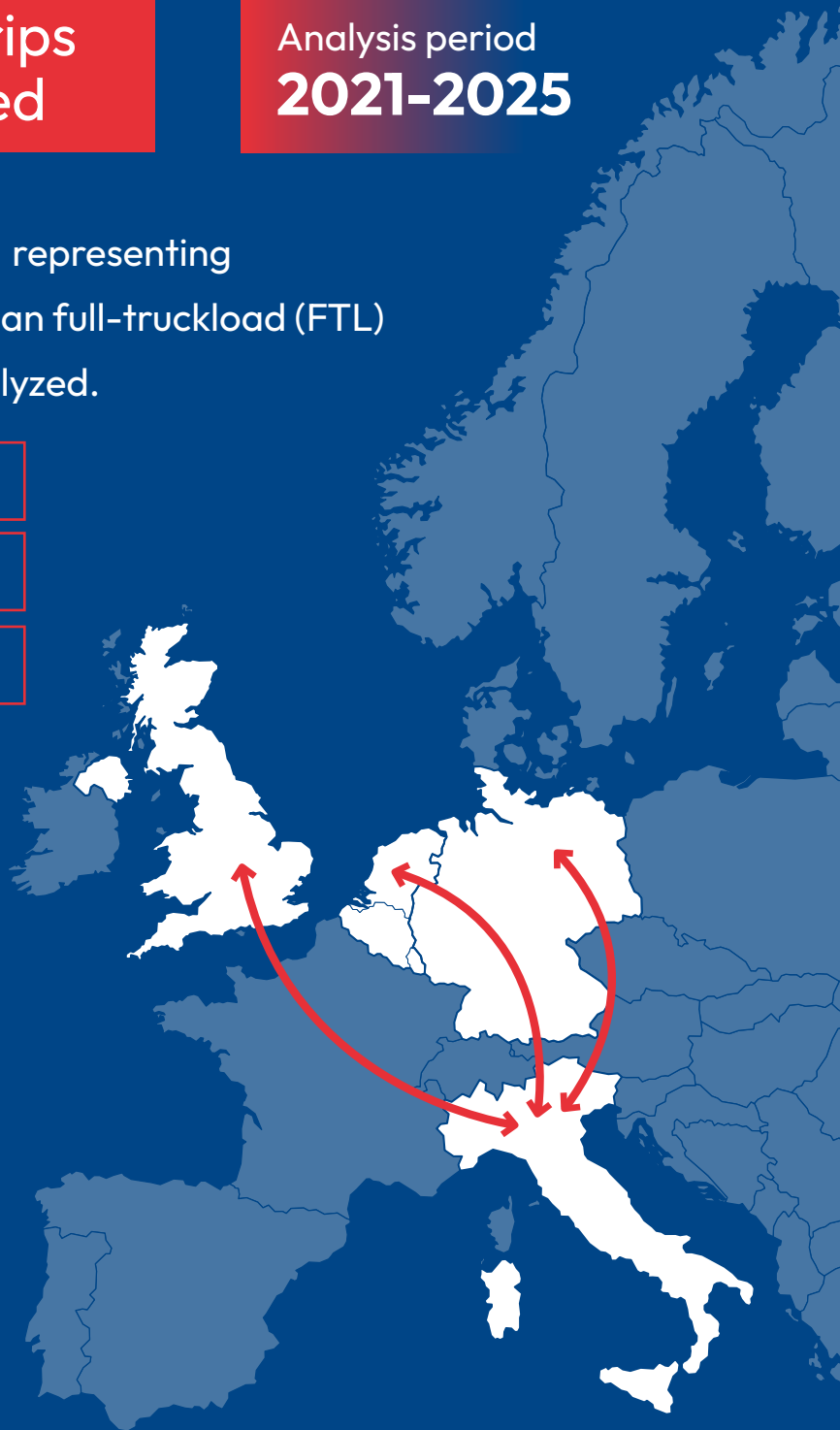
NORTHERN ITALY ↔ GERMANY

NORTHERN ITALY ↔ UK

The analysis considers volume trends, transit times, transport capacity, and the costs of road freight transport between Italy and the main European industrial hubs.

The data is based on shipments managed via the Transporeon platform.

With over 30 million shipments per year, the platform represents the largest transport dataset in Europe, providing a representative picture of approximately 10% of the European FTL road transport market.



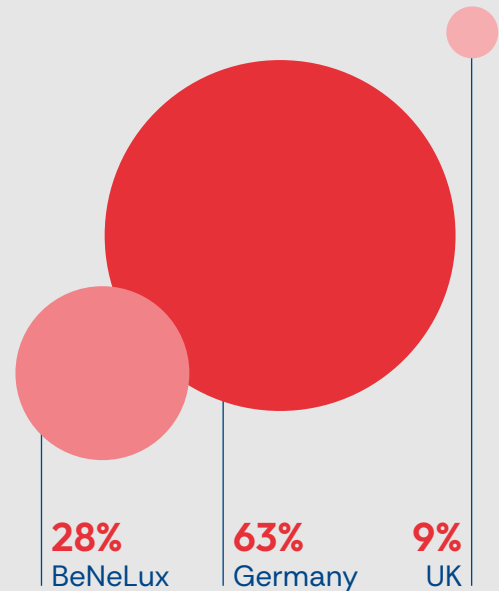
Volumes

NORTHERN ITALY ⇄ BENELUX
100.000 + FTL/year

NORTHERN ITALY ⇄ GERMANY
220.000 + FTL/year

NORTHERN ITALY ⇄ UK
30.000 + FTL/year

Quote 2024-2025



- **Germany and the Benelux countries are Italy's main trading partners.**

The most strategic freight corridors link North-Eastern and North-Western Italy with South-Western Germany and the Benelux.

- These corridors are characterised by **high transport volumes and long-distance routes** (800–1,200 km).

- Industrial production volumes in Germany have **slowed**, reflecting the downturn in manufacturing activity and broader economic uncertainty across the Eurozone.

Transit Times

41%

of the road freight volumes analyzed
have a transit time of more than 48 hours

- These volumes are particularly **suitable for modal shift**, helping to reduce reliance on road transport and improve resilience to supply chain disruptions and operational issues.
- They represent approximately **143,000 FTL shipments per year**, out of a total of 350,000 FTL shipments analyzed in our dataset.
- Routes to the United Kingdom show longer average transit times, mainly due to the logistical complexities associated with crossing the Channel and the customs procedures introduced following Brexit.

ROUTE	<48h	48-96h	>96h
NORTHERN ITALY ⇄ BENELUX	60%	40%	0%
NORTHERN ITALY ⇄ UNITED KINGDOM	23%	64%	13%
NORTHERN ITALY ⇄ NORTHERN GERMANY	49%	51%	0%
NORTHERN ITALY ⇄ SOUTHERN GERMANY	77%	23%	0%

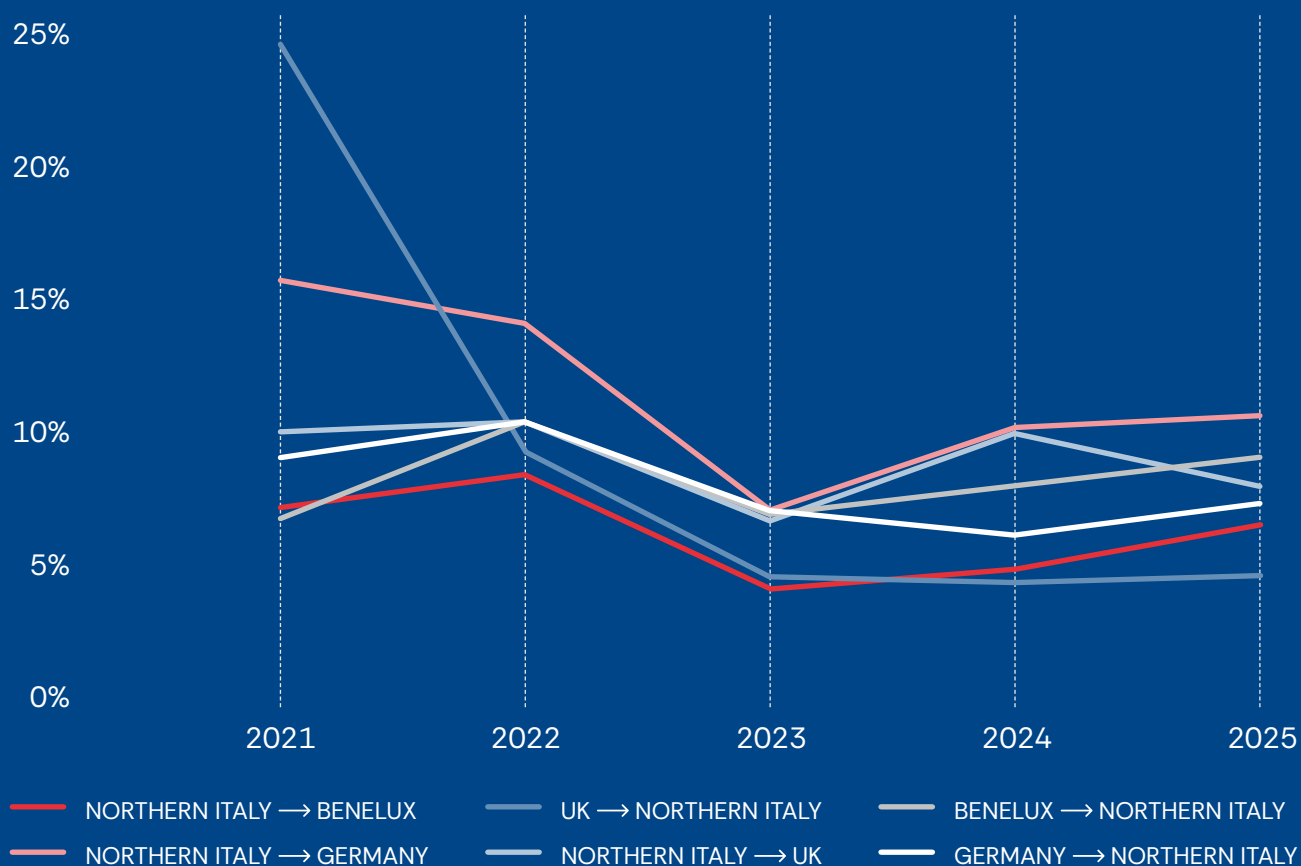
Rejection of cargoes

We use contracted cargo rejections as our main capacity KPI for road transport in Europe; they provide a direct indication of availability and constraints in the transport market.

Why do we use rejections of contracted cargoes as an indicator of truck capacity?

- A high rejection rate indicates limited truck capacity, with possible delivery delays, load rescheduling, and pressure on operating costs
- Low rejection rates indicate that available capacity is adequate to meet demand, allowing for smoother cargo management and facilitating greater competition among road operators, with potential benefits in terms of prices and guaranteed service levels
- An increase in rejections drives volumes towards the spot market, where truck availability is more limited, and transport prices tend to rise, affecting contractual planning and operating margins
- Rejection rates are dynamic and subject to multiple variables, including economic cycles, seasonality, and extraordinary events. Effective management requires constant monitoring and predictive analysis to optimize capacity and contain costs

CORRIDORS	2021	2022	2023	2024	2025	
NORTHERN ITALY → BENELUX	8,5%	9,6%	5,9%	6,6%	8,0%	↑
NORTHERN ITALY → UK	11%	12%	8%	11%	11%	
NORTHERN ITALY → NORTHERN GERMANY	16%	15%	8%	10%	9%	
BENELUX → NORTHERN ITALY	8,3%	12%	8,2%	9,3%	10,4%	↑
UK → NORTHERN ITALY	25%	11%	6%	6%	6%	
GERMANY → NORTHERN ITALY	10%	12%	8%	8%	9%	↑



Markets trends

- **Structural volatility.** The limited capacity observed in 2021–2022 temporarily eased in 2023, but the renewed tightening in 2024–2025 highlights persistent constraints in road transport capacity with potential impacts on costs and reliability.
- **Current situation.** The market has shifted from a severe shortage to a state of partial equilibrium, but pressure on capacity is rising again, requiring careful management of flows and contracts.

Examples of corridors

- **High volatility.** The Germany–Italy corridors show strong exposure to manufacturing cycles. For example, the North–East Italy → East Germany corridor reached a peak rejection rate of 29.5%, highlighting cyclical and seasonal instability.
- **Constant pressure.** The Northern Italy ⇌ United Kingdom routes show consistently high rejection rates (8–15%). On unbalanced routes, road transport alone is unlikely to absorb the growth in demand, making it necessary to consider alternative strategies such as multimodality.

Evolution of TCO

The **Total Cost of Ownership (TCO) model** is a **comprehensive financial tool** designed to simulate and reflect the cost calculations used by road hauliers. The model takes into account **all direct and indirect costs** associated with transporting a full load (FTL), including drivers' wages, tolls, fuel, rolling stock costs, services and maintenance. This model is often used for **strategic planning** and **rate negotiations**, as it highlights the gap between cost trends and rate trends, particularly in volatile market conditions.

Routes from Italy to Germany or the Benelux countries have seen sharp increases in road transport costs over the last four years, with **rises of around 25% or more**.

2021/2025 HIGHEST CHANGES

NORTH-WEST ITALY ⇄ SOUTH GREAT BRITAIN **+16,6%**

NORTH-WEST ITALY ⇄ CENTRAL GREAT BRITAIN **+16,8%**

Rises in wages, fuel and vehicle costs

NORTH-EAST ITALY ⇄ BENELUX **+32,6%**

NORTH-EAST ITALY ⇄ NORTH GERMANY **+27,9%**

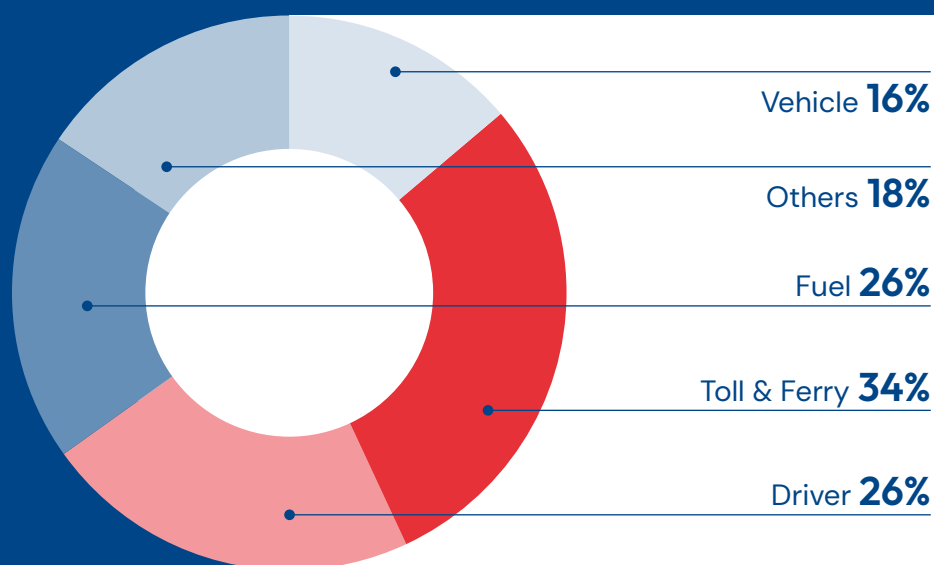
Rise in wages, fuel and vehicle costs, and a sharp increase in road tolls in Germany, Austria and Switzerland

CORRIDORS	2021-22	2022-23	2023-24	2024-25	2021-25
NORTHERN ITALY → BENELUX	17%	2,3%	5,7%	2,3%	29,5%
NORTHERN ITALY → UK	10,8%	2,8%	2%	1,3%	17,7%
NORTHERN ITALY → NORTHERN GERMANY	14%	1,4%	7,5%	2,2%	27,1%
NORTHERN ITALY → SOUTHERN GERMANY	13,4%	1,5%	4,4%	2,8%	23,6%

Cost components

The volatility of road transport – driven by rising costs and limited capacity – drives the use of intermodal solutions on specific corridors, combining efficiency gains and scalability with lower emissions.

Changes in cost components from 2021 to 2025



- Changes in cost components from 2021 to 2025 tolls and ferries alone represented a 34% increase in costs.
- The relatively smaller rise in fuel and vehicle costs is mainly attributable to the sharp and disproportionate increase in tolls, largely driven by the introduction of new CO₂-based systems in the EU.
- Intermodal solutions benefit from lower cost pressures linked to tolls and drivers' wages, particularly in transalpine operations. For road transport, these costs are set to rise further, at a rate above the average.
- All routes from Italy to Germany or the Benelux countries have seen sharp increases in road costs over the last four years of around 25% or more, highlighting a significant advantage for modal shift. This trend is expected to persist in the next few years.

Highlights

NORTH-EAST ITALY → BENELUX

Corridor with high-cost pressure favouring a modal shift.

- The 32.6% increase in TCO and rising rejection rates indicate a tightening of road transport capacity.
- Transit times frequently exceed 48 hours on corridors of around 1,000 km**, with a reduction in reliability.
- Intermodal transport via Alpine rail corridors offers structural advantages: lower exposure to tolls and labour costs (≈60% of road cost variations) and a significant reduction in CO₂.

NORTH-WEST ITALY → GERMANY

Industrial corridor with structural intermodal opportunities.

- Rising trends in rejection rates and road transport costs (up 26% since 2021) indicate reduced capacity and challenging conditions in the road transport market.
- Transit time reliability is deteriorating, with a growing proportion of shipments taking over 48 hours.
- Particularly suitable for distances >800 km, reducing exposure to driver shortages and capacity volatility

NORTHERN ITALY → SOUTHERN UK

A small corridor offering the stability benefits of intermodal transport.

- Post-Brexit volumes remain structurally lower, but prices are rising (+18.8%) due to ferry and regulatory costs.
- Transit times of over 48 hours are common due to the logistical complexity of crossing the English Channel.
- Road capacity remains volatile and unattractive due to high exposure to customs duties, fuel costs, and ferry disruptions.
- Rail-ferry intermodal solutions can improve price stability and efficiency in customs clearance.



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Contship is the partner of choice for integrated port logistics and intermodal transport services. The Group is committed to providing integrated and customized solutions to meet its customers' logistics needs, with a key strength deriving from the direct management of its assets.

The distinctive features of the logistics offer include a strong focus on digitalization, sustainability, and the vertical integration of services.

[contshipitalia.com](https://www.contshipitalia.com)



Trimble is a global technology company.

In the logistics sector, it offers platforms for fleet management, route planning, supply chain visibility, and regulatory compliance, supporting shippers, freight forwarders and carriers with automation and data analytics tools.

Among its solutions, **Transporeon** is a cloud-based transport management platform that connects shippers, freight forwarders, carriers, and retailers within a single digital network. Founded in 2000, and now part of the Trimble Group, Transporeon is one of the leading global cloud-based logistics platforms.