

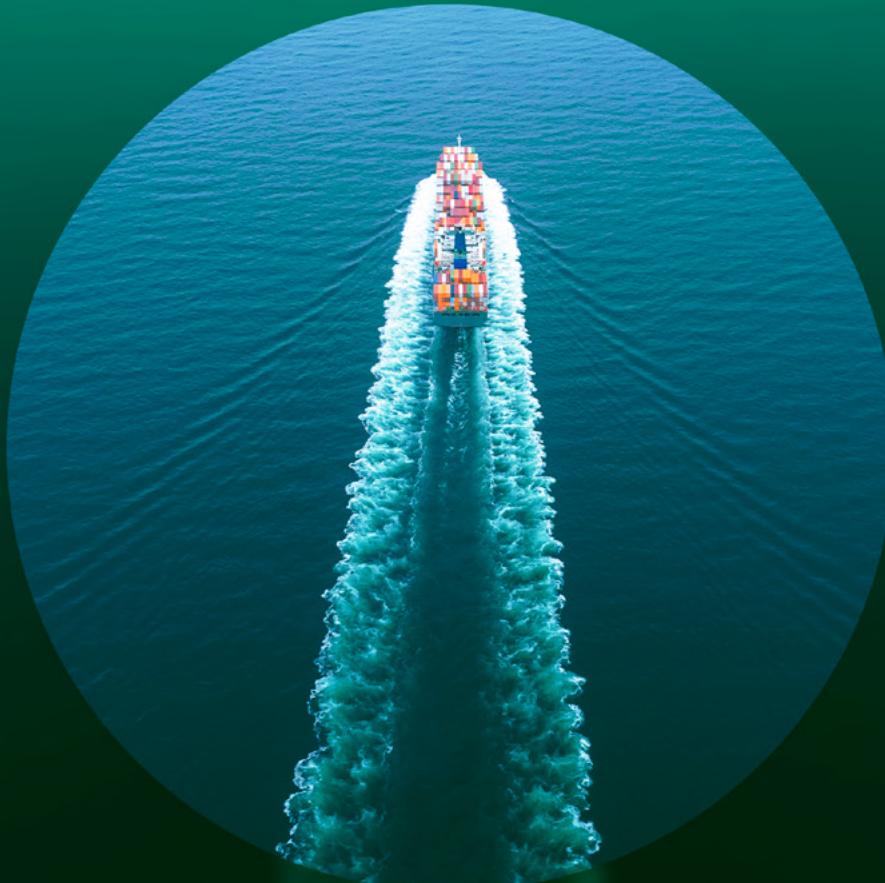
# Deloitte.

*Together makes progress*

## Future of freight

Navigating to volatile time

Executive brief for decision-makers in the  
European logistics industry

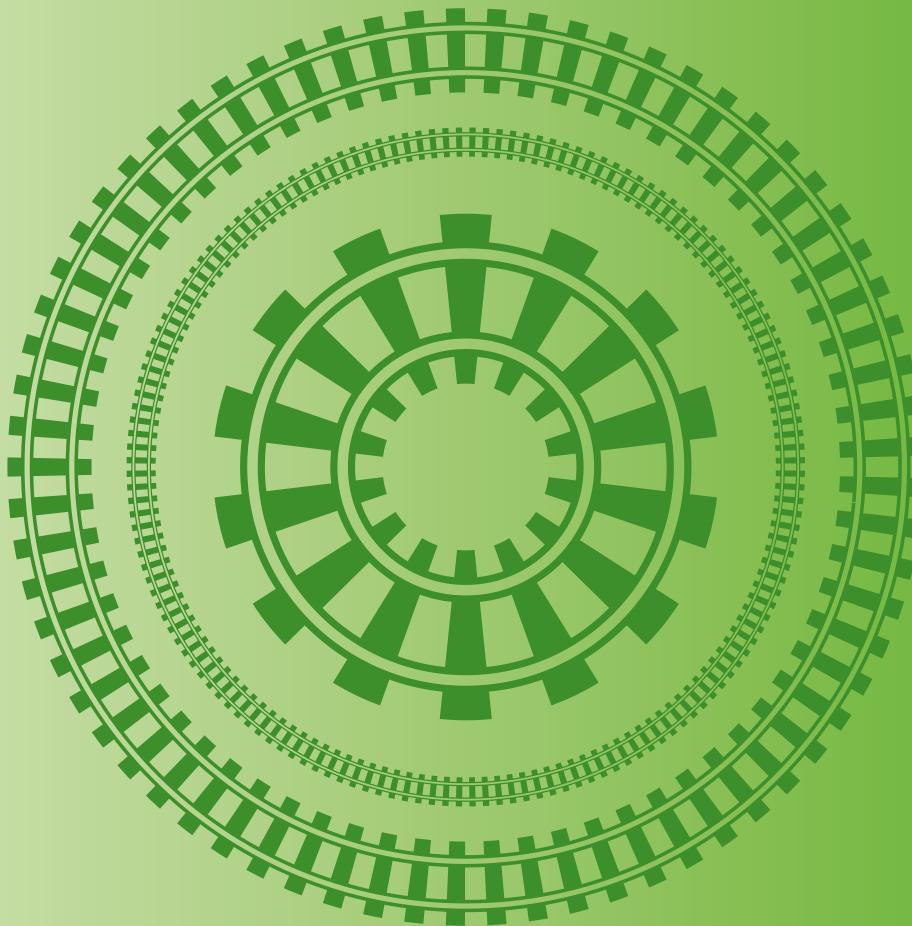


# Contents

01	Executive summary	3	4. Restructuring	20	
02	Why now? – European logistics under pressure	5	Global view – M&A as a catalyst for transformation and resilience	20	
03	Global trends, European realities – Deloitte's six forces in a European context	7	European reality – ESG, IT harmonization, and capability-driven consolidation	20	
	1. Nearshoring – Strategic repositioning of freight in a fragmented world	10	Strategic implications – What European logistics leaders must do now	21	
	Global view – Nearshoring <sup>4</sup> as a structural realignment of global supply chains	10	5. Fleet transformation	23	
	European reality – New gateways, new dynamics, new demands	10	Global view – Propulsion innovation and autonomous systems reshape fleet strategy	23	
	Strategic implications – What European logistics leaders must do now	11	European reality – Electrification, hydrogen, and infrastructure bottlenecks	23	
	2. Technology & data	13	Strategic implications – What European logistics leaders must do now	24	
	Global view – Digitalization as a strategic imperative in freight	13	6. Public/private partnerships	26	
	European reality – Fragmentation, sovereignty, and scalability	13	Global view – Public investment meets private agility	26	
	Strategic implications – What European logistics leaders must do now	14	European reality – TEN-T, Rail Baltica, digital terminals & multimodal integration	26	
	3. Changing competitive dynamics	17	Strategic implications – What European logistics leaders must do now	27	
	Global view – Strategic repositioning in a competitive freight landscape	17	04	Strategic implications – Options for European logistics leaders	28
	European reality – Fragmentation, margin pressure, and strategic consolidation	17			
	Strategic implications – What European logistics leaders must do now	18			
					02

01

# Executive summary



01

02

03

04

03

# Executive summary



European logistics is at a strategic inflection point. Global tensions, regulatory shifts, technological disruptions, and environmental challenges are reshaping the fundamentals of international supply chains. In this era of heightened volatility and uncertainty, companies need more than operational resilience – they need strategic clarity.

This European executive brief provides a European focus to Deloitte's global "Future of Freight" report. It applies the internationally recognized **Six Forces Model**<sup>1</sup> to the distinct realities found within the European market. The goal is to provide decision-makers in industry, trade, infrastructure, and logistics with a solid foundation for strategic decision-making.

## Key messages

- Global trends are highly relevant in Europe – but manifest differently.
- European logistics must actively manage geopolitical risks, regulatory complexity, and technological opportunities.
- Strategic options lie in the intelligent combination of investment, partnerships, and digital transformation.

Deloitte positions itself throughout this PoV as a thought leader in the transformation of European freight – offering deep market insight, global perspective, and actionable recommendations.



01

02

03

04

02

## Why now? – European logistics under pressure



01

02

03

04

05



01

02

03

04

# Why now? – European logistics under pressure

The European logistics sector is under the influence of multiple, mutually reinforcing pressure factors:



## Global uncertainty

The war in Ukraine, tensions in the Middle East, and geopolitical risks in Asia are destabilizing established trade routes.



## Regulatory complexity

US Customs policy, new EU trade agreements, and global tariff policies are reshaping cross-border freight conditions.



## Climate change & infrastructure stress

Extreme weather events are undermining the reliability of existing transport infrastructure. Emerging routes – such as the Northern Sea Route – offer opportunities but carry risks.



## Transformation pressure from sustainability & digitization

The EU Green Deal, "Fit for 55,"<sup>2</sup> and ESG requirements set clear goals for decarbonization and transparency.



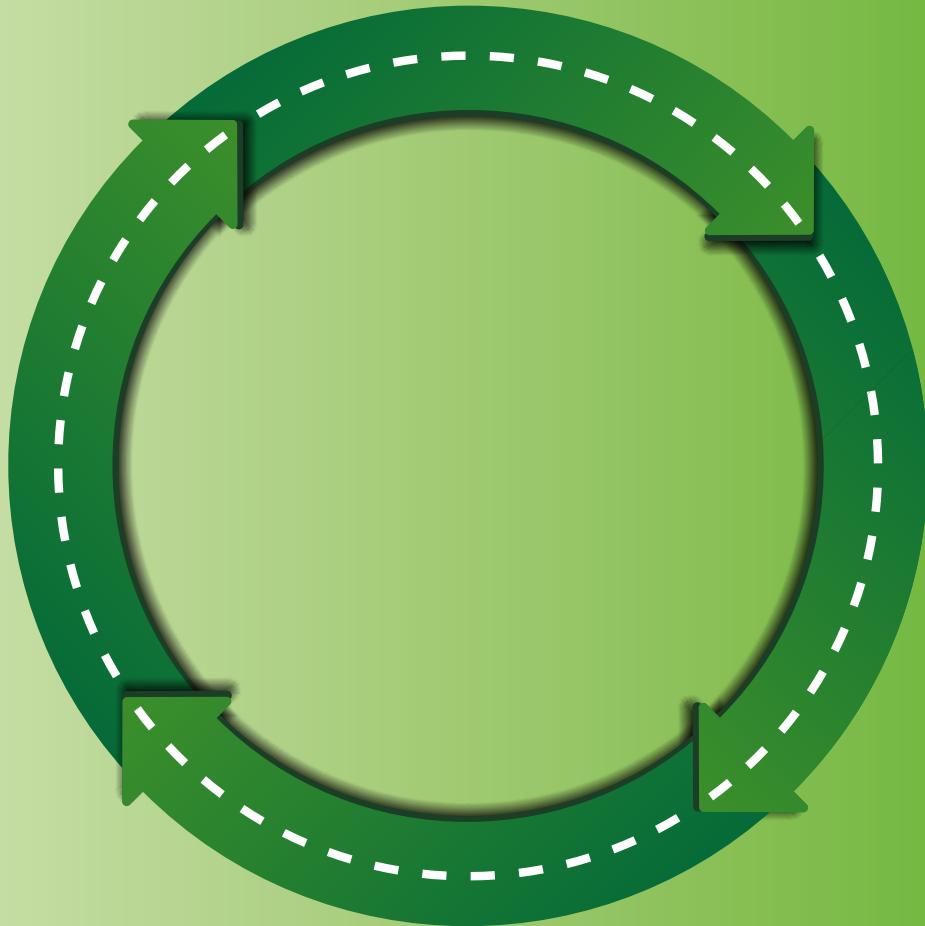
## Societal change

Demographic shifts, driver shortages, and evolving consumer expectations (e.g., same-day delivery, sustainability) are challenging traditional logistics models.

The time to act is now. The challenges are complex – but solvable.

The strategic response lies in combining resilience, sustainability, and digital excellence.

# Global trends, European realities – Deloitte's six forces in a European context





01

02

03

04

# Global trends, European realities – Deloitte's six forces in a European context



Deloitte's global PoV, *The Future of Freight*, provides a strategic framework for understanding the fundamental forces reshaping freight markets worldwide. In an environment defined by geopolitical fragmentation, exponential technological change, ESG-driven transformation, and shifting competitive dynamics, the PoV identifies six interdependent forces that are redefining the rules of the game:



1. Nearshoring



2. Technology & data



3. Changing competitive dynamics



4. Restructuring



5. Fleet transformation



6. Public-private partnerships

These forces are not isolated – they interact systemically across all transport modes and geographies. They influence capital allocation, operating models, regulatory exposure, and

customer expectations. For logistics leaders, they represent both a strategic challenge and a window of opportunity.

This **European executive brief** builds on the global framework and translates it into the specific realities of the European freight ecosystem. Each force is analyzed through a structured, decision-oriented lens:

- **Global perspective** – What are the macroeconomic, technological, and geopolitical drivers shaping this force globally?

- **European reality** – How does this force manifest in the European context – across regulation, infrastructure, market structure, and policy?
- **Strategic implications** – What are the actionable priorities for European logistics leaders?

This structure enables a clear translation of global trends into regionally relevant strategies. It supports executives in navigating complexity, prioritizing investments, and positioning their organizations for long-term advantage in a volatile and decarbonizing world.



01

02

03

04



01

02

03

04



## 1. Nearshoring – Strategic repositioning of freight in a fragmented world

### Global view – Nearshoring<sup>4</sup> as a structural realignment of global supply chains

Geopolitical instability, rising trade barriers, and ESG pressure have triggered a structural shift in global supply chains. Enterprises are relocating production closer to consumption markets to mitigate risk and enhance resilience. This transformation is reshaping freight dynamics:

- A shift is occurring in Ocean freight, with long-haul volumes declining and short-sea shipping gaining traction. According to UNCTAD<sup>12</sup> and Drewry<sup>13,14</sup> reports, regionalized maritime flows have grown by 8–12% over the past three years, driven by nearshoring and geopolitical risk mitigation. Road freight is

becoming increasingly critical for connecting regional manufacturing clusters.

- The transition is towards multimodal, regionally integrated networks, moving away from global, linear supply chains, with a focus on flexibility, speed, and sustainability. Far from being a temporary adjustment, nearshoring is a strategic inflection point with long-term implications for fleet strategy, infrastructure investment, and digital orchestration.

### European reality – New gateways, new dynamics, new demands

Europe is both a beneficiary and a complex theater of nearshoring:

- The relocation of manufacturing to Eastern Europe (Poland, Czech Republic, Hungary, Romania) is creating new transport corridors and increasing reliance on land-based freight (e.g., road, barge, rail in the hinterland)
- Nearshoring is driving the emergence of new multimodal gateways in Southern and Eastern Europe. Ports like Piraeus (Greece) and Koper (Slovenia) are evolving into strategic alternatives to traditional hubs such as Rotterdam and Hamburg – offering proximity to production clusters, integrated inland connectivity, and geopolitical diversification.

- Ocean carriers are evolving beyond the traditional CY-CY model, integrating inland logistics to offer end-to-end solutions.
- Road freight is becoming increasingly critical as the backbone of intermodal networks – linking regional manufacturing clusters with rail and barge corridors for sustainable last-mile delivery.

Europe's nearshoring landscape is characterised by fragmentation, regulatory complexity, and infrastructure stress – but also by strategic opportunity to reshape freight networks.

#### Strategic implications – what European logistics leaders must do now

**Reconfigure networks:** Build resilient, multimodal transport architectures with diversified gateways and integrated inland-ocean strategies.

**Adapt fleets and infrastructure:** Invest in regionally optimized fleets with alternative propulsion systems and leverage EU funding for sustainable logistics assets.

**Scale digital orchestration:** Deploy real-time platforms and AI-driven capacity planning to dynamically manage nearshoring flows.

**Leverage ESG as a differentiator:** Embed CO<sub>2</sub> transparency across the supply chain, offer ESG-compliant services, and position sustainability as a premium feature.

**Strategically develop talent:** Establish regional competence hubs, launch digital training programs, and diversify recruitment to secure operational readiness.



01

02

03

04



01

02

03

04

### Resilience through nearshoring and digital multimodality

"Europe's freight industry is undergoing a profound transformation – driven by nearshoring, digitalisation and decarbonisation. These forces aren't just trends; they're redefining how supply chains operate. The next era of logistics will belong to those who build for resilience and agility, not those who wait to adapt. Across our European operations at DP World, we see Türkiye emerging as a critical gateway, hydrogen corridors reshaping long-haul freight, and multimodal rail links connecting new trade flows across the continent.

Freight forwarders and 3PLs are increasingly investing in data-led platforms that put customer signals at the heart of their operations. At DP World, we're embracing AI and automation to anticipate demand, optimise routing and enhance execution. Our focus is on delivering frictionless journeys that help our customers move goods faster, safer and more sustainably than ever before."

*Rashid Abdulla, CEO Europe, Dubai Ports World*



01

02

03

04



## 2. Technology & data

### Global view – Digitalization as a strategic imperative in freight

Technology is no longer a support function in logistics – it is the strategic backbone of future freight systems. Telematics, artificial intelligence, IoT, and autonomous operations are reshaping how goods move, how decisions are made, and how value is created. Global freight leaders are transitioning from asset-centric models to data-driven ecosystems:

- Platform ecosystems are replacing proprietary silos.
- Real-time data enables dynamic capacity orchestration and predictive logistics.

- AI-powered systems optimize routing, reduce emissions, and automate customs and compliance.
- Digital twins and simulation models enhance resilience against disruptions.

Digitalization is not just about efficiency – it is about strategic control. Those who have access to, and can integrate and leverage the value of information will define the future of freight – shifting the focus from ownership to interoperability and actionable insights.

### European reality – Fragmentation, sovereignty, and scalability

Europe faces a dual challenge: the pressure to digitize is rising, but structural barriers hinder seamless implementation and cross-border scalability.

- **Fragmented market structure:** Thousands of SMEs operate with legacy systems and manual processes, limiting transparency and efficiency.
- **Lack of interoperability:** Diverse standards and interfaces across countries and sectors obstruct seamless data exchange.

- **Data sovereignty risks:** Dependence on non-European software providers introduces geopolitical vulnerabilities in critical supply chains.
- **Technology gaps in SMEs:** Many smaller players lack the capital and capabilities to invest in AI, automation, and platform integration.

Yet, the European landscape also offers unique opportunities:

- Platforms like **Pairpoint** and **Nexxiot** demonstrate how open ecosystems can drive transparency, provenance, and efficiency.

- EU initiatives such as the **Data Act** promote “compliance by design” and strengthen digital sovereignty.<sup>6</sup>
- Satellite data and space intelligence unlock new dimensions of predictive routing and infrastructure resilience.

#### Strategic implications – What European logistics leaders must do now

##### 01. Scale platform ecosystems

Move beyond proprietary systems toward open, interoperable platforms. The goal is a “Single Pane of Glass” that provides full visibility across all transport modes and supply chain phases.

##### 02. Embed AI as a strategic logic

AI must evolve from a tool for efficiency to a core decision-making engine – optimizing routes, managing capacity, automating customs, and enabling ESG-compliant operations.

“AI-based route optimization tools cut fuel consumption by 5–10% by factoring in weather, traffic, and load profiles. These systems are key enablers of low-emission transport strategies.”

*Source: Technavio<sup>5</sup>*



01

02

03

04



01

02

03

04

#### 03. Secure data sovereignty

Diversify technology portfolios and prepare exit strategies to reduce dependency. European providers and open-source models gain strategic relevance.

#### 04. Deliver customer-centric data services

“Know Your Cargo” becomes the new standard. Customers expect full transparency on shipment origin, condition, and ESG footprint – integrated into their systems in real time.

#### Transparency through AI-based location technology

“Companies around the world are increasingly reliant on global supply chains and the complex coordination required to manage them. To be successful in this environment, logistics professionals need maximum visibility into the status of shipments across the entire journey from origin to final destination,” said Gino Ferru, SVP and General Manager EMEA, HERE Technologies. “This call for visibility can only be answered by advanced AI based location technology. By continuously innovating new solutions, including accurate positioning data informed by more than just GPS and geofencing technology that can determine not just where a shipment is – but how it is being shipped, HERE and its Partners like Deloitte are shaping the future of transport and logistics.”

*Gino Ferru, HERE Technologies*

“AI-powered IoT sensors and GPS technologies enable continuous visibility across the supply chain – especially for temperature-sensitive goods such as pharmaceuticals. Real-time data is becoming the new standard for operational excellence.”

*Source: Technavio<sup>5</sup>*



01

02

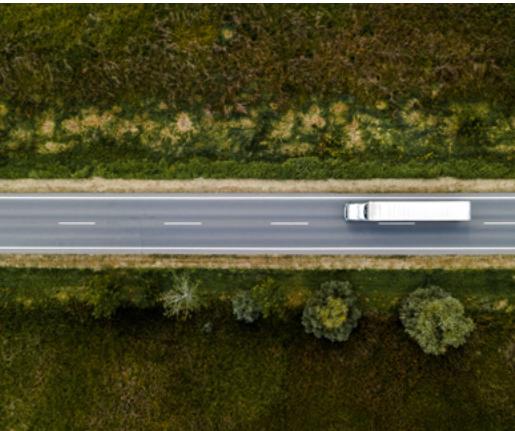
03

04

### Data-driven transparency as the new standard

"Data-driven transparency is no longer optional – it is the foundation of trust and efficiency in global freight ecosystems."

*Bjorn Jacobsen, Nexxiot*



### 05. Build resilience with space intelligence

Satellite data enables predictive routing, risk detection, and infrastructure planning. Integration into AI models enhances robustness against external shocks.

### Asset-to-asset communication as the future of logistics

"Because the edge devices on the container all have embedded cards, an entire new era of asset-to-asset communication and trading will be possible."

*Jorge Bento, founder and former CEO, Pairpoint*

### 06. Operationalize sustainability

Digital CO<sub>2</sub> dashboards, emissions-based pricing, and ESG-aligned services become key differentiators. Technology becomes the lever for sustainable competitiveness.

### 07. Develop digital talent

New technologies require new skills. Companies must invest in digital training, AI literacy, and platform fluency – especially among SMEs and operational teams.



01

02

03

04



### 3. Changing competitive dynamics

#### Global view – Strategic repositioning in a competitive freight landscape

The global freight industry is undergoing a profound transformation. New entrants, digital disruptors, and shifting customer expectations are redefining competition across all modes. Road freight is at the center of this change – challenged by rising costs, sustainability pressures, and talent shortages, yet empowered by technology and strategic consolidation.

- Traditional groupage models are under pressure from platform-based logistics and dynamic pricing.
- International FTL/LTL services remain profitable but face increasing complexity and volatility.

- Mergers, vertical integration, and digital harmonization are becoming strategic imperatives.
- Competitive advantage is shifting from scale alone to agility, customer intimacy, and data-driven orchestration.

The freight market is no longer defined by capacity – it is defined by capability.

#### European reality – Fragmentation, margin pressure, and strategic consolidation

Europe's road freight sector shows signs of fragmentation, though less pronounced than in the US market. While thousands of SMEs operate regionally, consolidation trends

and digital platforms are gradually reducing structural complexity. National groupage transport suffers from low margins and high competition, while international services offer better profitability but require scale, technology, and resilience.<sup>8</sup>

- **Fragmented market structure:** Many operators lack the capital and digital maturity to compete effectively.
- **Margin pressure:** Rising tolls, CO<sub>2</sub> levies, and fuel costs squeeze profitability – especially for smaller players.
- **Driver shortages:** Labor constraints are limiting growth and increasing operational risk.

### 03. Global trends, European realities – Deloitte's six forces in a European context

- **Sustainability mandates:** EU climate targets demand fleet modernization and emissions transparency.
- **Digital divide:** Larger players invest in telematics, TMS, and predictive analytics – smaller firms fall behind.

At the same time, strategic consolidation is accelerating:

- Roll-up strategies are creating national champions with standardized fleets and processes.
- Vertical integration enables control over terminals, infrastructure, and customer interfaces.

- M&A is increasingly driven by access to technology, talent, and geopolitical resilience.

#### Strategic implications – What European logistics leaders must do now

##### 01. Consolidate for scale and efficiency

Pursue targeted acquisitions to build national and regional champions. Harmonize fleets, processes, and systems to unlock economies of scale and improve service quality.

##### 02. Integrate vertically to control the value chain

Secure access to infrastructure – terminals, charging stations, intermodal hubs – and customer interfaces. Control over the

backbone of logistics enables margin protection and strategic flexibility.

#### 03. Digitize operations for competitive advantage

Invest in telematics, AI-based planning, and real-time visibility platforms. Use predictive analytics to optimize routes, reduce empty runs, and dynamically manage capacity.

#### The container as a source of truth in intermodal transport

“Not only the maritime sector, but the total intermodal chain with the container as the source of truth.”

*Thomas Bagge, CEO at DCSA*



01

02

03

04

#### 04. Build Resilience through diversification

Develop alternative corridors and regional networks to mitigate geopolitical risks. Use M&A to acquire assets in stable markets and expand routing options.

#### 05. Operationalize sustainability

Modernize fleets with alternative propulsion systems. Embed CO<sub>2</sub> data into pricing and customer portals. Use ESG as a differentiator in tenders and partnerships.

#### 06. Develop talent and workforce strategies

Address driver shortages through improved working conditions, digital training, and recruitment innovation. Align workforce planning with fleet and technology transformation.

#### 07. Explore new financing models

Leverage EU funding, PPP structures, and ESG-linked instruments to finance fleet upgrades, infrastructure access, and digital transformation.

#### 08. Prepare for automation as a strategic lever

Level 4 autonomous vehicle pilots are accelerating in controlled freight corridors, offering a medium-term mitigation strategy for driver shortages. While Level 5 autonomy remains a long-term goal, regulatory sandboxes and OEM partnerships indicate earlier adoption in freight than in passenger transport – positioning automation as a structural solution for resilience and efficiency.

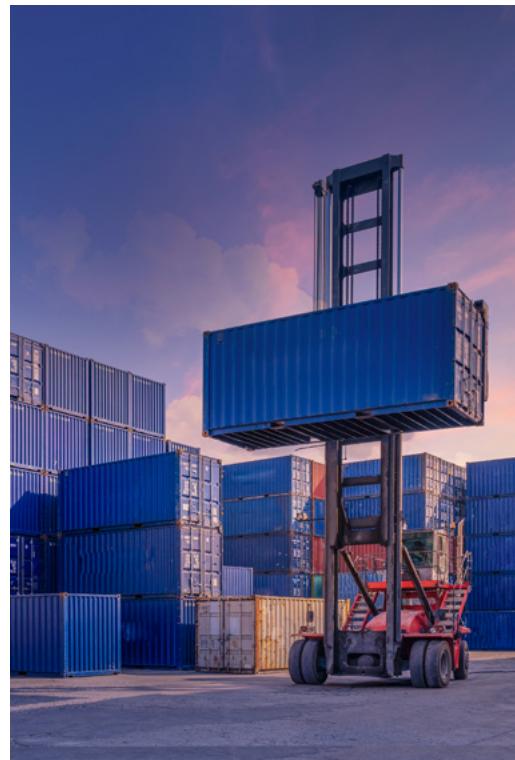


01

02

03

04





01

02

03

04



## 4. Restructuring

### Global view – M&A as a catalyst for transformation and resilience

Mergers & Acquisitions (M&A) have evolved from scale-driven transactions to strategic tools for transformation, digitalization, and resilience. In a landscape shaped by geopolitical uncertainty, technological disruption, and ESG imperatives, targeted acquisitions and divestitures are unlocking new value:

- Strategic acquisitions provide access to digital assets, resilient networks, and new markets.
- Divestitures help streamline portfolios and exit non-strategic or ESG-critical operations.

- Private equity and infrastructure investors are accelerating consolidation across logistics and transport.
- AI-powered due diligence, digital valuation models, and post-merger integration platforms are becoming standard.

M&A<sup>7</sup> is no longer just about growth – it's about strategic repositioning in a volatile world.

### European reality – ESG, IT harmonization, and capability-driven consolidation

In Europe, M&A is increasingly shaped by regulatory pressure, sustainability goals, and digital transformation needs. Despite a recent slowdown in the momentum toward exclusively

renewable energy, sustainability imperatives remain strong – particularly in waste reduction, energy efficiency, and circular logistics models.:

- **ESG-driven portfolio optimization:** Companies are divesting carbon-intensive assets and investing in sustainable platforms.
- **Cross-border IT harmonization:** Integrating fragmented IT landscapes is critical for scalability and compliance (e.g., eFTI, CSRD, DTLF).
- **Capability-driven consolidation:** M&A is shifting from industry segments to functional capabilities – such as infrastructure control, digital orchestration, and resilient networks.

- **Innovative financing models:** ESG-linked bonds, tokenized infrastructure investments, and PPP structures enable scalable capital deployment.

The European M&A landscape is transitioning from volume-based deals to strategic capability plays.

#### Strategic implications – What European logistics leaders must do now

##### 01. Develop capability-driven M&A strategies

Move beyond industry logic. Focus on acquiring functional capabilities like digital control, ESG excellence, and infrastructure access. Build interoperable ecosystems with direct customer interfaces.

##### 02. Integrate digital assets effectively

Post-merger integration must harmonize platforms, data flows, and customer interfaces. Use AI-powered tools to unlock synergies and minimize friction.

##### 03. Use ESG as a valuation and steering logic

Sustainability is becoming a valuation driver. CO<sub>2</sub> transparency, ESG reporting, and compliance are critical for capital access, customer loyalty, and regulatory alignment.

##### 04. Control infrastructure – “Own the backbone”

Secure access to multimodal hubs, charging infrastructure, and digital terminals. M&A enables targeted acquisitions or strategic stakes in critical infrastructure.



01

02

03

04



#### 05. Build resilience through geographic diversification

Acquire assets in stable markets or along alternative corridors to reduce geopolitical dependencies. Regionalization strengthens operational robustness.

#### 06. Leverage new financing models

Use ESG-linked instruments, EU funding (e.g., CEF, Horizon Europe), and PPP structures to finance fleets, infrastructure, and technology.

#### 07. Prioritize cultural integration and talent retention

Successful M&A requires not only technical integration but cultural alignment. Digital learning platforms, leadership programs, and transparent communication are key.



01

02

03

04



01

02

03

04



## 5. Fleet transformation

### Global view – Propulsion innovation and autonomous systems reshape fleet strategy

Fleet transformation is no longer a technical upgrade – it is a strategic imperative. Globally, logistics operators are rethinking fleet architecture in response to climate targets, cost pressures, and technological breakthroughs:

- **New propulsion systems** (electric, hydrogen, biofuels, ammonia) are redefining asset investment cycles.
- **Autonomous and semi-autonomous vehicles** are reshaping operational models, enabling 24/7 uptime and reducing labor dependency.

- **Fleet-as-a-Service models** are emerging, shifting ownership to usage-based models and enabling flexibility.
- **Digital fleet orchestration<sup>8</sup>** through AI, IoT, and predictive analytics is becoming standard.

Fleet strategy is now a convergence of sustainability, automation, and digital intelligence.

### European reality – Electrification, hydrogen, and infrastructure bottlenecks

Europe's fleet transformation is driven by regulatory pressure, funding incentives, and infrastructure readiness:

- **Electrification** is advancing in road freight, supported by AFIR and national subsidy schemes – but grid capacity and charging infrastructure remain bottlenecks.
- **Hydrogen and hybrid drives** are gaining traction, especially in long-haul and rail applications.
- **Modernization of rail fleets** includes investments in electric locomotives, ETCS systems, and predictive maintenance platforms.
- **Fleet leasing models** (e.g., Locomotive-as-a-Service) are enabling smaller operators to access modern assets without capital lock-in.

- **CO<sub>2</sub> monitoring and ESG reporting** are becoming mandatory, requiring integration of emissions data into fleet operations.

Europe's fleet transformation is complex – but accelerated by policy, funding, and innovation. Rail freight faces growing competition from the boom in passenger rail. New high-speed routes increase infrastructure pressure and create margin tension. Strategic questions arise: How do freight operators secure slots and maintain profitability amid passenger prioritization?"

#### Strategic Implications – What European Logistics Leaders Must Do Now

##### 01. Build a multi-fuel strategy

No single propulsion system will dominate. Companies must develop flexible strategies across electric, hydrogen, biofuels, and dual-fuel technologies – aligned with route profiles, infrastructure availability, and regulatory timelines.

##### 02. Leverage EU funding<sup>9</sup> and green finance

Tap into programs like Horizon Europe<sup>11</sup>, CEF Transport, and national decarbonization funds. Use ESG-linked bonds and leasing models to finance fleet upgrades without balance sheet strain.

##### 03. Digitize fleet operations

Implement AI-based fleet management systems for predictive maintenance, dynamic routing, and emissions optimization. Integrate telematics, IoT sensors, and digital twins to enhance visibility and control.

##### From steel container to smart fleet asset

"Knowing where the assets are, turning the steel box into an intelligent asset gives you permanent visibility on your fleet."

"We are enriching gated information to enlarge the visibility of real-time location."

*Andrea Schöning, Senior Director Container Steering, Hapag-Lloyd*



01

02

03

04

"AI-driven maintenance systems reduce equipment downtime by up to 35%. Integrating predictive analytics into container and terminal infrastructure enhances asset availability and lowers lifecycle costs."

*Source: Technavio, Global Shipping Container Market 2025–2029<sup>5</sup>*

#### 04. Transition to fleet-as-a-service models

Adopt usage-based fleet models to increase flexibility, reduce capital intensity, and align capacity with demand volatility. Explore partnerships with OEMs, leasing providers, and infrastructure operators.

#### New services through real-time capable containers

"The container turning into an intelligent asset, will be an entire new foundation for new services and products for the shipping lines."

"From operational excellence to real-time visibility products and services."

*Andre Simha, Chief Digital & Innovation Officer, MSC*

#### 05. Align fleet strategy with ESG goals

Embed CO<sub>2</sub> data into customer portals, pricing models, and ESG dashboards. Use sustainability as a differentiator in tenders and partnerships.

#### 06. Prepare for autonomous and connected ecosystems

Invest in autonomous-ready assets, platooning technologies, and V2X communication systems. Engage with regulators to shape legal frameworks and pilot programs.

#### 07. Integrate road and rail fleet strategies

Develop intermodal fleet strategies that optimize the strengths of each mode. Invest in pop-up terminals, modular assets, and digital interfaces to enable seamless transitions.



01

02

03

04



01

02

03

04



## 6. Public/private partnerships

### Global view – Public investment meets private agility

Infrastructure modernization is no longer a government-only endeavor. Globally, successful freight systems are built on:

- **Public investment** to secure strategic infrastructure, decarbonization, and resilience.
- **Private agility** to accelerate execution, drive innovation, and ensure operational excellence.
- **Public-Private Partnerships (PPPs)** to co-finance and co-operate multimodal hubs, digital terminals, and green corridors.

- **Governance innovation** through usage-based pricing, ESG-linked investment logic, and digital project management.

In **ocean freight**, PPPs are emerging around port electrification, onshore power supply, and digital terminal ecosystems. In **road freight**, partnerships are forming around charging infrastructure, autonomous corridors, and sustainable logistics platforms.

### European reality – TEN-T, Rail Baltica, digital terminals & multimodal integration

Europe is investing strategically in transport infrastructure transformation:

- **TEN-T corridors**<sup>3</sup> connect economic centers and promote modal shift.
- **Rail Baltica**<sup>10</sup> exemplifies cross-border integration, digital control, and geopolitical resilience.
- **Digital terminals** with real-time data, automated handling, and AI-driven capacity orchestration are emerging in hubs like Rotterdam, Duisburg, and Verona.
- **Multimodal integration** with road freight: pop-up terminals, smart transshipment points, and shared platforms link road and rail.



01

02

03

04

- **Private participation** in charging infrastructure, terminal operations, and digital platforms is increasing – often via M&A or joint ventures.

Europe is building a connected, digital, and sustainable infrastructure ecosystem.

#### Strategic implications – What European logistics leaders must do now

01. **Treat infrastructure as a strategic asset**  
Don't just use infrastructure – co-own and co-develop it. Strategic stakes in terminals, hubs, and digital platforms secure access, control, and margin protection.

02. **Actively shape PPP models**  
Initiate partnerships with public authorities, energy providers, and tech firms. Design governance models with clear roles, ESG logic, and digital transparency.
03. **Develop multimodal hubs as innovation centers**  
Position hubs not just as transshipment points, but as digital control towers with real-time data, AI logic, and ESG reporting.
04. **Use digitalization to drive efficiency and transparency**  
Integrate digital project management, BIM models, process automation, and CO<sub>2</sub> monitoring into infrastructure development.
05. **Leverage M&A to access infrastructure capabilities**  
Acquire terminal operators, rail-tech startups, or platform providers to gain strategic control and accelerate innovation.
06. **Embed ESG into investment logic**  
Ensure infrastructure projects are ESG-compliant – from planning to operation to financing. Use ESG-linked bonds and carbon-based pricing models to align incentives.
07. **Engage early in policy and funding processes**  
Proactively participate in regulatory design, funding applications, and infrastructure planning to secure strategic advantages and financing flexibility.

## Strategic implications – Options for European logistics leaders



01

02

03

04



01

02

03

04

# Strategic implications – Options for European logistics leaders



European logistics leaders face a decisive moment. The convergence of geopolitical volatility, regulatory transformation, technological disruption, and sustainability imperatives demands a strategic reset. This chapter distills the six forces into actionable imperatives for C-level decision-makers.

**Deloitte identifies seven strategic imperatives that define the future trajectory of freight in Europe:**

## 01. Architect resilient, multimodal networks

- Redesign network topologies to mitigate geopolitical exposure and increase agility.

- Invest in alternative gateways, pop-up terminals, and intermodal corridors.
- Enable seamless integration across road, rail, ocean, and inland waterways.

## 02. Scale platform ecosystems and AI capabilities

- Transition from legacy systems to open, interoperable platforms.
- Embed AI as a core logic for routing, pricing, and ESG compliance.
- Leverage real-time data for predictive orchestration and disruption management.

#### 04. Strategic implications – Options for European logistics leaders

##### 03. Operationalize sustainability as a competitive lever

- Decarbonize fleets through multi-fuel strategies and digital CO<sub>2</sub> dashboards.
- Integrate ESG metrics into pricing, customer portals, and performance management.
- Position sustainability as a premium differentiator in tenders and partnerships.

##### 04. Consolidate strategically and integrate vertically

- Use M&A to acquire digital capabilities, infrastructure access, and talent.

- Harmonize systems and processes to unlock scale, efficiency, and resilience.
- Build functional ecosystems that span transport modes and geographies.

##### 05. Co-design infrastructure through public-private partnerships

- Engage in TEN-T and national infrastructure programs.
- Develop multimodal hubs as digital control towers with ESG-linked governance.
- Use PPPs to accelerate investment, innovation, and operational excellence.

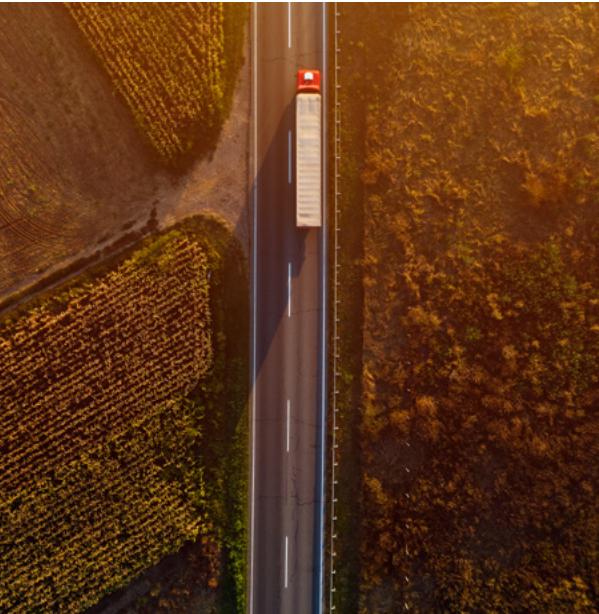


01

02

03

04



01

02

03

04

### 06. Digitize fleet operations and transition to fleet-as-a-service

- Implement predictive maintenance, autonomous-ready assets, and real-time visibility.
- Use leasing and green finance to modernize road and rail fleets.
- Align fleet strategy with demand volatility, ESG goals, and digital control.

### 07. Shape the future through policy, talent, and innovation

- Engage proactively in regulatory design and funding programs.
- Build digital talent and leadership capabilities across all levels.
- Foster innovation through partnerships, venture models, and ecosystem thinking.

The European logistics sector faces not only challenges – but a historic opportunity for strategic repositioning. Deloitte supports this transformation as a thought leader and implementation partner.

# Authors and Contacts



01

02

03

04



**Tillman Hentschel**  
Industry Sector Leader  
& Transport Sector Lead,  
Germany & Central  
Europe  
thentschel@deloitte.de



**Tobias Koppe**  
Logistic Sector Lead,  
Germany & Central  
Europe  
tkoppe@deloitte.de



**Sven Kamps**  
Senior Advisor Logistics  
& Transport, Germany  
skamps@deloitte.de



**Nick Davies**  
Industry Sector Leader  
Switzerland & Central  
Europe  
nidavies@deloitte.ch



**Suren Thadani**  
Logistic Sector Lead  
North & South Europe  
surenthatdani@deloitte.co.uk



**Helena Lisachuk**  
IoT Global Lead,  
Netherlands  
helisachuk@deloitte.nl



**Werner Fontanive**  
Deloitte Fellow at the  
Center for the Edge  
wfontanive@deloitte.ch



01

02

03

04

# Endnotes

1. Deloitte (2025): *The Future of Freight – Global Report*.  
<https://www.deloitte.com/global/en/Industries/transportation/perspectives/future-of-freight.html> (date of access 23.01.2026)
2. Europäische Kommission (2025): *Fit for 55 – Delivering the European Green Deal*.  
[https://commission.europa.eu/topics/climate-action/delivering-european-green-deal-fit-55-delivering-proposals\\_en](https://commission.europa.eu/topics/climate-action/delivering-european-green-deal-fit-55-delivering-proposals_en) (date of access 23.01.2026)
3. Europäische Kommission (2025): *TEN-T Policy Overview*.  
[https://transport.ec.europa.eu/transport-themes/infrastructure-and-investment/trans-european-transport-network-ten-t\\_en](https://transport.ec.europa.eu/transport-themes/infrastructure-and-investment/trans-european-transport-network-ten-t_en) (date of access 23.01.2026)
4. Deloitte (2025): *Decarbonizing Road Freight*.  
<https://www.deloitte.com/global/en/Industries/energy/perspectives/decarbonizing-road-freight.html> (date of access 23.01.2026)
5. Technavio (2025): *Global Shipping Container Market 2025–2029*.  
<https://www.technavio.com/thankyou?report=IRTNT71482&type=Request%20Free%20Sample&rfs=epd&src=report&pdfversion=2&freedemo=906914> (date of access 23.01.2026)
6. Europäische Kommission (2025): *Data Act – Digital Sovereignty*.  
<https://digital-strategy.ec.europa.eu/en/policies/data-act> (date of access 23.01.2026)
7. Deloitte (2025): *M&A Trends in Logistics*.  
<https://www.deloitte.com/uk/en/Industries/consumer/blogs/mergers-and-acquisitions-in-the-european-transport-and-logistics-market.html> (date of access 23.01.2026)
8. Trassenpreiserhöhung im Schienengüterverkehr.  
<https://www.deloitte.com/de/de/Industries/transportation/research/trassenpreiserhoehung-im-schienengueterverkehr.html> (date of access 23.01.2026)
9. Europäische Kommission (2025): *Horizon Europe – Transport Research*.  
[https://cinea.ec.europa.eu/programmes/horizon-europe/transport-research-horizon-europe\\_en](https://cinea.ec.europa.eu/programmes/horizon-europe/transport-research-horizon-europe_en) (date of access 23.01.2026)
10. Rail Baltica (2025): *Projektbeschreibung*.  
<https://www.railbaltica.org/about-rail-baltica/> (date of access 23.01.2026)
11. Europäische Kommission (2025): *Connecting Europe Facility (CEF) – Transport*.  
[https://commission.europa.eu/funding-tenders/find-funding/eu-funding-programmes/connecting-europe-facility\\_en](https://commission.europa.eu/funding-tenders/find-funding/eu-funding-programmes/connecting-europe-facility_en) (date of access 23.01.2026)
12. UNCTAD Review of Maritime Transport 2025: [https://unctad.org/system/files/official-document/rmt2025overview\\_en.pdf](https://unctad.org/system/files/official-document/rmt2025overview_en.pdf) (date of access 23.01.2026)
13. Short-Sea Shipping in Europa (2025) <https://ec.europa.eu/eurostat/statistics-explained/index.php?oldid=653440> (date of access 23.01.2026)
14. Europe's Shortsea Shipping Surge <https://breakbulk.com/articles/europe's-shortsea-shipping-surge> (date of access 23.01.2026)

# Deloitte.

Deloitte refers to one or more of Deloitte Touche Tohmatsu Limited (DTTL), its global network of member firms, and their related entities (collectively, the "Deloitte organization"). DTTL (also referred to as "Deloitte Global") and each of its member firms and related entities are legally separate and independent entities, which cannot obligate or bind each other in respect of third parties. DTTL and each DTTL member firm and related entity is liable only for its own acts and omissions, and not those of each other. DTTL does not provide services to clients. Please see: [www.deloitte.com/de/UeberUns](http://www.deloitte.com/de/UeberUns) to learn more.

Deloitte provides leading professional services to nearly 90% of the Fortune Global 500® and thousands of private companies. Legal advisory services in Germany are provided by Deloitte Legal. Our people deliver measurable and lasting results that help reinforce public trust in capital markets and enable clients to transform and thrive. Building on its 180- year history, Deloitte spans more than 150 countries and territories. Learn how Deloitte's approximately 460,000 people worldwide make an impact that matters at [www.deloitte.com/de](http://www.deloitte.com/de).

This communication contains general information only, and none of Deloitte GmbH Wirtschaftsprüfungsgesellschaft or Deloitte Touche Tohmatsu Limited (DTTL), its global network of member firms or their related entities (collectively, the "Deloitte organization") is, by means of this communication, rendering professional advice or services. Before making any decision or taking any action that may affect your finances or your business, you should consult a qualified professional adviser.

No representations, warranties or undertakings (express or implied) are given as to the accuracy or completeness of the information in this communication, and none of DTTL, its member firms, related entities, employees or agents shall be liable or responsible for any loss or damage whatsoever arising directly or indirectly in connection with any person relying on this communication. DTTL and each of its member firms, and their related entities, are legally separate and independent entities.