

## Press release

### Trend barometer for transport logistic 2025 Growing confidence despite high cost pressure

March 19, 2025

- Global market situation medium to good
- Sector is confident about the future
- Despite AI, humans remain crucial to success

The cost pressure and bureaucratic hurdles are high. The shortage of skilled workers is still noticeable. Nevertheless, the transport logistic 2025 mood barometer also shows a turnaround. In the fight against costs, emissions and cyber attacks, industry and trade are increasingly pulling together with the logistics and transport sector. 1,851 exhibitors and visitors expressed their confidence in the market situation in an online survey conducted from February 18 to March 4, 2025.

Markets worldwide are shaped by uncertainty. None of the 1,851 visitors and exhibitors surveyed described their current market situation as very good. Nevertheless, nine out of ten respondents are confident about the future. Of these, 43 percent describe the current situation as good, 48 percent as average, and just under ten percent as poor. Europeans assess the situation as worse, especially in Germany.

#### Companies at risk

The most important issue worldwide is cost pressure, which is exacerbating the market situation for more than three quarters of the companies. The second limiting factor is where opinions differ. While the main complaint in Germany is the bureaucratic burden (58 percent), abroad it tends to be geopolitics (49 percent). The third most common obstacle to success, at 48 percent, is the lack

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of skilled workers.

Despite the difficult conditions, the exhibitors and visitors surveyed tend to be optimistic overall. One in two (52 percent) expect the market situation to improve in the next two years. Germany (46 percent) is somewhat more cautious than other countries (60 percent), while Asians (80 percent) are particularly confident.

### **Industry leads the way**

A large proportion (76%) of the sector is actively engaged in cybersecurity, first and foremost industry. Here, 85 percent of respondents are actively arming themselves against cyber attacks. Respondents from the forwarding and transport sector are at the bottom of the list at a high level. Here, only 70 percent are active or very active. Of those surveyed, 37 percent do not know whether they have already been the victim of cyber attacks. Of the remaining 63 percent, one in two have been targeted by cyber criminals at least once.

The sector is preoccupied with sustainability reports (68 percent) at a similar level. Many respondents from industry (83 percent) and trade (75 percent) are actively addressing the issue. The figures are lower for logistics service providers (68 percent) and respondents from the forwarding and transport sector (64 percent). Reporting is not limited to Europe. At least one in two respondents worldwide are also active or very active in this area.

### **Into the future with AI**

Artificial intelligence has been adopted by an average of 54 percent. Among those surveyed, industrial companies and logistics service providers are the leaders in the use of the new technology with 58 percentage points each. The main areas of use worldwide are administration, customer service, and controlling. In terms of production processes, industry at 26 percent is ahead of rail freight transport (19 percent), logistics service providers (18 percent), forwarding and transport (9 percent), and trade (5 percent). In Germany, two out of three respondents use AI at least in part. For 60 percent of those surveyed, humans are the most important success factor.

### **Tear down silos**

Alongside cybersecurity, AI and sustainability, the conference program also focuses on multimodal supply chains, drive technologies, data mining or analytics. “The sector is dealing with many issues and is already very active. However, many things can only be tackled together,” says Dr. Robert Schönberger, Global Industry Lead transport logistic exhibitions, and continues: “Although the sector is under pressure, the mood is improving because industry, trade and service providers are moving closer together. transport logistic is the ideal platform for that, where ideas for sustainable supply chains can be developed and silos broken down – with a view to the environment, people and companies.”

### **High participation at top level**

From February 18 to March 4, 2025, a total of 1,851 exhibitors and visitors from all over the world took part in the online survey. 78 percent of those surveyed are in management positions. The most strongly represented sectors are forwarding and transport (29 percent), industry (15 percent) and logistics service providers (15 percent). The survey was conducted by the opinion research institute IFaD on behalf of Messe München.

**You can find more information at <https://transportlogistic.de/en/>**

### **transport logistic**

transport logistic is the international trade fair for logistics, mobility, IT and supply chain management and the largest trade fair in the world for the multi-faceted transport of goods by road, rail, water and air. air cargo Europe, an exhibition of the global air cargo industry, is integrated into transport logistic.

### **Messe München**

As one of the world's leading trade fair organizers, Messe München presents the world of tomorrow at its around 90 international trade fairs. These include twelve of the world's leading trade fairs such as bauma, BAU, IFAT, and electronica. Its portfolio comprises trade fairs for capital and consumer goods, as well as for new technologies. Together with its 1,300 employees in the group and the affiliated companies, it organizes trade fairs in China, India, Brazil, South Africa, Turkey, Singapore, Vietnam, Hong Kong, Thailand, and the U.S. With an international network of affiliated companies and foreign representatives, Messe München is active worldwide. The more than 150 events held annually attract around 50,000 exhibitors and around three million visitors in Germany and abroad. This makes Messe München an important economic driver, triggering purchasing power effects in the billions.