

Trend Scan

February 2025

Vol.4

2025 Major Logistics Trends

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Shaping the Future of Logistics

2025 is bringing rapid technological development and new uncertainties, mainly due to changes in the geopolitical landscape. While digitalization, sustainability, and workforce shortages remain critical forces, evolving challenges are reshaping the logistics industry.

For the third consecutive year, the Insights & Intelligence Team has collected key signals to track in 2025.

Continuously Changing Geopolitical Landscape

- The outcome of the U.S. presidential election has heightened geopolitical uncertainties, with probable new protectionist trade policies straining transatlantic trade and driving a surge in U.S. imports ahead of potential tariffs (Quartz).
- Germany's early elections in February highlight ongoing economic struggles, sparking debates on revitalizing growth and rethinking its export-oriented model for greater resilience (WSJ).

- BYD's emergence as the top electric vehicle manufacturer, surpassing Tesla, underscores China's expanding influence in global electromobility and across other critical sectors, reshaping global market dynamics (South China Morning Post).

Rising Impact of AI

- Microsoft plans to invest approximately \$80 billion in fiscal year 2025 to build AI-enabled data centers, addressing the growing demand for artificial intelligence infrastructure amid industry-wide power constraints (Latitude Media).
- In 2024, according to data provider PitchBook, roughly half of the \$209 billion spent by U.S. venture capitalists went to AI companies (Financial Times).
- Companies are testing the use of AI agents for drug discovery, customer service, marketing, coding, and research - logistics could be one of the next sectors to adopt this innovation (WSJ).
- McKinsey predicts that generative AI could automate ca. 30% of work hours by 2030, yet only 21% of companies currently have clear usage policies, mainly to mitigate risks (IMD).

Autonomous Driving: A Breakout Year?

- Aurora, Continental, and NVIDIA have partnered to develop driverless trucks, with plans for mass production by 2027 (Yahoo).
- Torc Robotics, an independent subsidiary of Daimler Truck, has begun testing production-ready driverless trucks in Texas, marking a significant step toward their planned commercial launch in 2027 (Forbes).



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- Traton (Scania, MAN, Navistar) and Plus reached a milestone in November 2024 with a new release of its key software now powering Traton’s Level 4 autonomous trucks in Europe and the U.S. (Forbes).

Is ESG Struggling?

- Net-zero transition policies are being revisited in several countries. The OECD reports that the shift to net-zero emissions by 2050 is expected to cause significant labor market shifts, with job losses in high-emission industries (e.g., automotive) and gains in low-emission sectors (OECD).
- In 2024, businesses made progress with “measure-to-manage” initiatives (CSRD), but industry experts predict that tackling complex challenges like climate change, biodiversity loss, and supply chain disruptions in 2025 and beyond will increasingly require strategic partnerships (IMD).

What could be the Dark Horses in Logistics for 2025?

Humanoid Robotics

Humanoid robotics is identified as a **multi-trillion-dollar opportunity**, with the potential to revolutionize the global economy. Powered by advanced AI, humanoid robots are emerging as a transformative force in logistics, automating complex tasks traditionally performed by humans, improving efficiency, and reshaping workforce dynamics (Financial Times).

Return of Extended Reality (XR)

Extended reality (XR) is making a resurgence, evolving into a versatile tool for both professional and personal applications. AI-integrated XR devices are enabling immersive experiences, intuitive navigation, and seamless integration with digital ecosystems (Google). As style, convenience, and privacy become priorities, XR could see broader adoption across industries, potentially making a triumphant return in logistics applications.

Conclusion

2025 promises to be a year of dynamic changes and transformative advancements in the logistics sector. However, it is crucial to remember that a **trend represents a direction of change driven by various forces**. To distinguish between a genuine trend and a passing buzz, we must track developments over an extended period.

We continuously monitor these trends to provide our customers with actionable insights, enabling them to adapt strategically and thrive in the evolving logistics landscape.





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