Sweden Freight and Logistics Market - Growth, Trends, Covid-19 Impact, and Forecasts (2023 - 2028)

Market Report | 2023-01-23 | 150 pages | Mordor Intelligence

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Report description:

The logistics market in Sweden is expected to witness a CAGR of more than 3% through the forecast period.

Key Highlights
The pandemic has created extreme imbalances among transport and logistics companies. The purchases of food and pharmacy items in Sweden have been strongly positively affected in the early weeks of COVID-19, with increased positive pressure on logistics channels and logistics properties.
On the other hand, the sectors like automotive harmed the logistics market. With the lockdown relaxations in the second half of 2021, there has been an increase in economic activities across Sweden.
The logistics market in Sweden is the largest in the Scandinavian region. Investments in infrastructure have made the country one of the top logistics markets in Europe and the World. The central location in the region makes it the preferred choice for companies that look to consolidate distribution and warehousing activities in Northern Europe to one central location. Foreign companies use some 10 Swedish locations for centralized distribution in Northern Europe.
The Swedish economy is highly dependent on exports of goods. The strong cross-bordpositively impactsimpact on the transportation industry and logistics market. Gothenburg is a leading logistics location in the country, supported by the Port of Gothenburg and new logistics establishments. The Port of Gothenburg has a 53% share of the Swedish container market, which is an increase of three percentage points compared with the first half of 2021. The Port of Gothenburg also increased its market share for containers compared with nearby major ports in Northern Europe.
The cleantech, ICT, life sciences, automotive, and materials science industries are some emerging industries in Sweden. E-commerce and retail are also fast-growing sectors in the country, which are expected to boost the logistics demand, especially in the warehousing sector.

Sweden Freight & Logistics Market Trends

Growth in the Rail Freight Segment

The share of new entrants in the Swedish rail freight sector has significantly increased. The vertical separation of the Swedish rail industry between infrastructure and train operations is often regarded as highly successful, bringing the benefits of competition.

The Swedish government has established that new main lines are needed between Stockholm, Gothenburg, and Malmo. To increase opportunities for sustainable and reliable passenger and freight transport by rail, the Swedish Transport Administration is planning and building new main lines. The new main lines will be made in stages, with the first three being the East Link, Gothenburg-Boras, and Hassleholm-Lund.

The rail freight sector in the country faces high competition from the road freight industry. The Shift2Rail initiative is based on digitalization enabling various levels of automation and intelligence in the rail system, and it involves an investment of about SEK 8 million (USD 0.76 million).

Multimodality is a required field where also ITS solutions/applications are developed. More than 60% of the containers handled in the port are transported by rail, and around 70 trains arrive and depart from the Port of Gothenburg daily. Also, the rail-port intermodal concept of the port contributes to significant emission reduction. One subproject is about intelligent video gates (IVG) capturing data with the help of optics and RFID, enabling better information sharing and operational planning in, e.g., intermodal terminals.

Growing E-commerce Accelerating the Demand for Logistics Facilities

At the end of 2021, Swedish e-commerce was projected to hit USD 14,990 million and reach USD 24,825 million in market volume in five years. User penetration stood at the level of 74.8%, and by the end of 2025, it is expected to hit 81.8%.

Online shopping continues to gain popularity among Swedish consumers. Among the Nordic countries, Sweden has the highest percentage of the population shopping online, supported by 96% of households having Internet access. Online shopping among Swedish consumers in this clothing increased by 14% during the pandemic and is expected to remain higher even after restrictions are lifted (an 8% increase compared to pre-pandemic levels). More specifically, the share of Swedish consumers that buy food and groceries online once a week or at least several times per month is 40% higher than before the pandemic. It is expected to stay 17% higher compared to pre-pandemic levels. The expansion is notable among the elderly, especially for pharmacies and groceries. A record-high 82% of the population have now bought a product online.

E-commerce is expected to continue gaining momentum in the Swedish market, with the shift away from traditional physical retail further amplified by the COVID-19 pandemic.

Such an increase in demand for fast and seamless delivery triggered by e-commerce penetration in the country is driving the demand for technologically advanced logistics facilities.

Sweden Freight & Logistics Market Competitor Analysis

Sweden's freight and logistics market is fragmented, with many international and domestic players active. The distribution network comprises many freight forwarders and third-party logistics (3PL) companies. Some prominent players in the market include DHL, DB Schenker, DSV, Greencarrier, Geodis, and PostNord.Technologies such as automation, Big Data, and analytics are expected to play a significant role in the Swedish logistics market.

Additional Benefits:

The market estimate (ME) sheet in Excel format
3 months of analyst support

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