

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

Market Report | 2023-01-23 | 120 pages | Mordor Intelligence

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Report description:

The German freight and logistics market is expected to register a CAGR of more than 3% during the forecast period 2022-2027.

As Germany is an export-driven economy, the COVID-19 pandemic-induced restrictions harmed the country's exports, and cancellations of orders from other nations interrupted the operations of freight and logistics companies across the country. Germany has emerged as Europe's most important logistics advertiser, owing to its geographic location, excellent infrastructure, and technological access. The most common mode of freight transit is by road, followed by rail and inland conduits. Because of the burgeoning e-commerce business industry, last-mile delivery is a growing business in the country.

Germany is a major mining country in Europe. Hard coal and lignite, as well as natural gas and crude oil, account for most mineral resources mined in Germany. Drilling activity, concessions, geophysical surveys, and production of petroleum and natural gas in Germany decreased in 2020. The number of active drilling projects declined by 75% in 2020 compared to 2019. The authorized field area was reduced by roughly 25% to 35,500 square kilometers over the same comparison period. Geophysical measurements to explore the subsurface for crude oil or natural gas were not available in 2020. Crude oil output decreased by 1.4% to 1.9 million ton, and crude gas production decreased by 15% to 5.6 billion cubic meters compared to 2019.

In comparison to the previous year, the volume of products loaded and unloaded in German maritime ports declined by 6.4% in 2020, with 275.7 million ton of goods loaded or unloaded in total. Furthermore, in 2020, Germany's transport volume in the road freight sector amounted to 304.6 billion ton-kilometers.

Germany Freight & Logistics Market Trends

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E-commerce Sector to Drive Market Growth

The logistics industry is growing as the development and growth of e-commerce increase the demand for logistical services. In Germany, the e-commerce sector generated EUR 83.3 billion in revenue in 2020. This growth was majorly due to the disruption created in the retail sector by the COVID-19 pandemic, which made businesses adopt online markets. In 2019, Germany's e-commerce sector was worth EUR 72.6 billion, with electronics and media accounting for a majority of sales. Germany has one of Europe's most developed e-commerce markets. The number of people who shop online, the percentage of people who use the internet, and the average amount spent per year are all higher than the European average.

In January 2022, Germany had 78.02 million internet users, with more than 93% of the total population using the internet. In addition, around 64.5 million people purchased consumer goods through e-commerce platforms. Furthermore, in 2021, e-commerce revenue generated from goods in the country amounted to more than EUR 99 billion, with a growth rate of 18% compared to the previous year.

Furthermore, the rise of e-commerce is altering shippers' expectations, particularly the requirement to support omnichannel retailing and a greater emphasis on agility and speed in a complex supply chain with less time for consolidations and delivery optimization. As a result, land transportation companies are being forced to restructure portions of their supply chain networks to meet client needs. The improved reputation of Germany's online merchants, dealers, and deliveries has resulted in more orders in the German market. German customers are risk-averse and demand high-quality goods. As a result, the e-commerce industry is a major driving force in the logistics industry.

Road Holds the Major Market Share of Freight Transport

In Germany, most goods are moved through road freight transport. According to the Federal Motor Transport Authority, in 2021 (up to July), more than 1.77 trillion ton of goods were carried through road freight. More than 1.39 billion goods were carried under transportation by hire or reward mode, while 382.46 million goods were carried by transportation on their own account mode. Furthermore, in 2021, more than 90% of goods were carried by national transportation services.

Furthermore, road transport is the primary mode of transit between Germany and European Union countries. Germany's major road transport importing partners are Poland, Italy, Austria, and Spain. In 2020, the import value of Poland was USD 66.7 billion, Italy's was USD 61.66 billion, Austria's was USD 44.3 billion, and Spain's was USD 35.7 billion. On the other hand, in 2021, truck traffic reached a record level in the country, as the market share of truck cargo in freight transport rose almost one and a half percentage points to 72%.

However, Germany's exports declined by 9.3% in 2020. This significantly impacted Germany's economic performance, which fell by 5%. As a majority of exports depend on trucking, the road transport logistic market was adversely hit by the pandemic. When Germany's economic model entered the crisis, it was immediately under attack from two directions, on the supply side, from failing supply chains, and on the demand side, from a significant drop in international orders. Germany, with a 43% export share in 2020, was affected far worse than other major industrial countries, such as China (18.4%), Japan (16.4%), and the United States (12.9%).

Germany Freight & Logistics Market Competitor Analysis

The report covers the major players operating in the German freight and logistics market. The market is highly competitive and fragmented and is expected to grow during the forecast period due to the growth in the e-commerce industry and several other factors. The major market players include Deutsche Post DHL Group, Fiege Logistics, Kuehne + Nagel International AG, etc. FIEGE partnered with the marketplace expert, Heyconnect. E-tailing is a booming market, with the number of online transactions on

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marketplaces, like Zalando, Amazon, and Otto increasing by the minute. The Hamburg-based start-up, Heyconnect, helps brands and retailers connect with online platforms and supports them in using marketplaces as a sustainable sales channel.

Additional Benefits:

The market estimate (ME) sheet in Excel format

3 months of analyst support

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