

Egypt Freight and Logistics - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts 2017 - 2029

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Report description:

The Egypt Freight and Logistics Market size is estimated at USD 14.56 billion in 2024, and is expected to reach USD 18 billion by 2029, growing at a CAGR of 4.33% during the forecast period (2024-2029).

Government infrastructure investment worth USD 16 billion in Egypt leading to smoother supply chains

- In 2020, Seychelles was the leading country in Africa in the African infrastructure development index (AIDI), with 96.73 points. It was followed by Egypt (second highest) and Libya (third highest), which scored 88.39 and 82.97 points, respectively. The index indicates the status of infrastructure development across the continent.
- In 2020, logistics costs in Egypt amounted to USD 30 billion. That same year, total logistics costs in Africa were USD 344.2 billion. In order to facilitate a smoother supply chain operation in the country, infrastructure development is underway. As of the fiscal year 2021/2022, the government investment in Egypt was around USD 22.8 billion. Investments in construction and real estate amounted to USD 16.24 billion, with infrastructure receiving the majority of the investment in this category.
- The volume of cargo transported via the sea in Egypt reached 42.1 million metric tons in the fourth quarter of 2021. Compared to the same quarter in the previous year, this represented an increase of 1.9 million metric tons. Over the observed period, the quantity of transported cargo was the lowest in the third quarter of 2021. Ocean transportation has been improving as a result of better supply chain development.

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Egypt Freight and Logistics Market Trends

Egypt allocated USD 5.96 billion to the storage and transportation industry in 2021, fueling key infrastructure projects

- In the general plan for FY2022, Egypt's transport sector was estimated to be valued at around EGP 307 billion (USD 12.38 billion), compared to EGP 240.7 billion (USD 9.70 billion) in the previous financial year. The transport sector output was EGP 672.4 billion (USD 27.11 billion) in FY 2022, up 14.7% from EGP 586.5 billion (USD 23.65 billion) in FY 2021. However, sea transport dominates Egypt's freight movement, as it is a cost-effective option for international trade. The Suez Canal, a vital global waterway, saw 124 million metric tons pass through it in January 2023 and a total of 1.41 billion metric tons in 2022.
- In 2021, the public investment in the storage and transportation industry amounted to approximately EGP 184.2 billion (USD 5.96 billion). These investments encompassed various projects, including the construction of two new Nile axes (Abu Ghaleb - Al-Qatta axis), the development of eight upper bridges along the Cairo-Alexandria agricultural road, the establishment of three bridges on the international coastal road, and the rehabilitation of the 350 km Qena/Abu Tartour railway, which connects the Cairo/Aswan railways with the Sudan railways.
- In 2022, Egypt planned around 80 projects, including port development, container terminals, cruise berths, marine passenger terminals, multimodal transportation, river ports, and a metro system, providing opportunities for private sector investment. The estimated cost of these initiatives, either in the planning or construction stages, was EGP 129 billion (USD 5.20 billion). A project's implementation, partnership, and investment opportunities in various transportation sub-sectors help boost the overall growth of Egypt's transportation and storage sector.

Egypt raises fuel prices by 10% due to the rise in average prices of Brent crude in the global energy market

- Egypt increased fuel prices in the domestic market by 25 piastres per liter of gasoline in 2022. The price of a liter of 80-octane gasoline rose from EGP 7 (USD 0.28) to EGP 7.25 (USD 0.29), the price of 92-octane gasoline rose from EGP 8.25 (USD 0.33) to EGP 8.50 (USD 0.34), and the price of 95-octane gasoline rose from EGP 9.25 (USD 0.37) to EGP 9.50 (USD 0.38) due to the government's push to convert petrol-powered vehicles to natural gas-powered vehicles. This move is expected to reduce the cost of petroleum products as per the state budget.
- In 2021, the price of 80-octane petrol increased by 7% to EGP 8/l (USD 42c/l), 92-octane by 6% to EGP 9.25/l (USD 49c/l), 95-octane by 9% to EGP 10.75/l (USD 57c/l), and diesel by 7% to EGP 7.25/l (USD 38c/l). The increases occurred primarily due to recovering global oil consumption following the COVID-19 pandemic. Supply concerns due to the Russia-Ukraine war were expected to cause oil prices to rise in 2021-22, increasing retail diesel prices. Egypt consumed 796 kb/d of petroleum products in 2021, up 9% from the previous year, including 289 mb/d of diesel and 192 kb/d of motor gasoline.
- Egypt's Fuel Automatic Pricing Committee has adjusted the fuel prices and increased them for Q2 2023. The country's fuel pricing committee left the diesel price unchanged at 7.25 pounds/litre (USD 0.29) but raised the price of 80-octane petrol by 0.75 Egyptian pounds (USD 0.03), 92-octane petrol by 1 pound (USD 0.04), and 95-octane petrol by 0.75 pounds to 8.75 Egyptian pounds (USD 0.29), 10.25 (USD 0.41) and 11.50 per litre (USD 0.46), respectively. This price increase was driven by the average prices of Brent crude in the global energy market and the value of the Egyptian pound against the US dollar.

Egypt Freight and Logistics Industry Overview

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The Egypt Freight and Logistics Market is fragmented, with the top five companies occupying 4.93%. The major players in this market are CMA CGM, Damietta Container & Cargo Handling Co. (DCHC), DB Schenker, Deutsche Post DHL Group and LATT Trading and Shipping SAE (sorted alphabetically).

Additional Benefits:

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

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