

## **Europe Cross Border Road Freight Transport - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts 2016 - 2029**

Market Report | 2024-02-17 | 265 pages | Mordor Intelligence

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### **Report description:**

The Europe Cross Border Road Freight Transport Market size is estimated at USD 176.74 billion in 2024, and is expected to reach USD 213.88 billion by 2029, growing at a CAGR of 3.89% during the forecast period (2024-2029).

#### Key Highlights

- Fastest Growing Segment by End User - Oil and Gas, Mining and Quarrying : The oil and gas, mining and quarrying sector has been growing at the fastest rate, with 81 new crude and natural gas projects anticipated to start operations in Europe over the next eight years.
- Largest Segment by End User - Manufacturing : Manufacturing is the largest segment boosted by the European automotive industry. The European automotive vehicle market is expected to record a CAGR of 3.38% from 2020 to 2030 and reach 21.59 million units by 2030.
- Fastest Growing Segment by Country - Spain : Spain is the fastest growing country in the market as it shares its borders with several European countries that have been fostering cross-border trade.
- Largest Segment by Country - Spain : Spain in Europe region accounts for the largest market share as it has a booming ecommerce market with value of around USD 36.3 billion in 2021 along with developing infrastructure.

### Europe Cross Border Road Freight Transport Market Trends

Manufacturing is the largest segment by End User.

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- In 2021, the European cross-border road freight market experienced a decline of 10.63% YoY in value, with the other end-users segment experiencing a significant decrease of 11.15%, followed by the wholesale and retail trade segment, with a decline of 10.14%. The decline of the other end-users segment was partly due to the decline in the share of EU pharmaceutical exports to China, which amounted to 6% in 2021, down from 6.8% in 2019. Meanwhile, EU pharmaceutical exports to Russia stopped in 2020 and 2021, dropping from a share of 4.7% in 2019.

- The wholesale and retail trade segment experienced a decline due to increased border constraints because of Brexit, which took place in January 2021 and forced several retailers and businesses to reduce or delay their deliveries from the United Kingdom. The European cross-border road freight market is expected to witness growth during the forecast period, with the construction segment expected to experience the highest CAGR of 6.7%, followed by the agriculture, forestry, and fishing segment, with a CAGR of 6.62%.

- The construction segment of the European cross-border road freight market is expected to grow as the Swedish construction industry is anticipated to grow by an average of 2.1% a year between 2022 and 2025, with continued growth in the infrastructure and residential sectors offsetting a decline in the commercial sector. Between 2022 and 2025, the construction market in Spain is also anticipated to rise by more than 4% annually. One of the reasons for the growth of the agriculture, forestry, and fishing segment is that milk production in the European Union is projected to grow at 0.5% per year and reach around 162 million ton by 2031.

Spain is the largest segment by Country.

- In 2020 and 2021, the European cross-border road freight transport market experienced a decline. One of the reasons for the decline was that Germany's domestic online purchases dominated the international ones, as online purchases from Europe and the countries outside held a 30% share, while the in-country share was approximately 70%. A similar trend was observed in Poland, Turkey, and Russia. However, in Italy, digital online sales from abroad outweighed the domestic ones with a 60% share, mainly because of the imports from European countries.

- Russia experienced a decrease in cross-border B2C online sales. Despite the expected increase in 2020, the number of cross-border online consumers increased from 22 million in 2019 to just 23 million in 2020, and it is predicted to decline to 21 million in 2022. In Russia, despite a significant increase in total B2C e-commerce sales between 2019 and 2020, the share of cross-border B2C online sales fell by 8%. The share of B2C e-commerce products imported from EU and non-EU sellers to the 27 European Union countries also fell from 45% in 2019 to 40% in 2020. The rate of cross-border online shopper penetration decreased for almost all countries of the EU28, except for Germany and the Czech Republic.

- Meanwhile, the markets that suffered the most were Montenegro (-55%), Malta, Iceland, and Estonia (-18%), and Bosnia and Herzegovina (-17%), with no market observing an increasing share in 2020. However, cross-border road transport is expected to increase as the share of cross-border online sales via global marketplaces is forecast to increase from 60% in 2019 to 66% in 2025 in Europe.

#### Europe Cross Border Road Freight Transport Industry Overview

The Europe Cross Border Road Freight Transport Market is fragmented, with the top five companies occupying 5.20%. The major players in this market are Dachser, DB Schenker, Deutsche Post DHL Group, DSV and XPO Logistics Inc. (sorted alphabetically).

#### Additional Benefits:

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

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