

Europe Freight And Logistics - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts 2017 - 2029

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Report description:

The Europe Freight And Logistics Market size is estimated at USD 1.03 trillion in 2024, and is expected to reach USD 1.26 trillion by 2029, growing at a CAGR of 4.11% during the forecast period (2024-2029).

Rising government investments such as UK governments USD 39.85 million freight route funding package driving service demand

- In Western Europe, the average return on equity (ROE) in the transport and logistics sector is 0.86%. As of January 2022, companies in the air transport industry in Western Europe saw average returns on equity of approximately -45.75%. Many countries are, however, improving their transportation infrastructure to improve trade flow in Europe. For instance, Germany and the United Kingdom are developing infrastructure through construction projects.

- In Germany, road infrastructure has also been rising, with total roads reaching 8,30,000 kilometers in 2021 from 6,44,480 kilometers in the previous year, representing an increase of 28.79% YoY. With an increased focus on road and infrastructure, the road freight transport market is expected to grow both domestically and internationally in Germany.

- In April 2020, the UK government announced the launch of a EUR 32.45 million (USD 39.85 million) freight route funding package. The government provided EUR 20.06 million (USD 24.63 million) of funding to protect five key freight routes between Great Britain and Northern Ireland during the COVID-19 pandemic. Another EUR 12.39 million (USD 15.21 million) was provided to support links with The Isle of Wight and The Scilly Isles. The package of measures also included the creation of a Transport Support Unit (TSU) to assist frontline responders during the COVID-19 crisis.

Transforming freight and logistics in Europe

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- The European freight and logistics market is dominated by countries like Germany, France, Italy, Spain and the United Kingdom. Road freight is a major mode of transport in the region. The German government recently allocated a fund of EUR 530 million (USD 578 million) to improve bridges across the network. Freight rates have also increased in Europe due to inflation, weakening demand, and the war in Ukraine. During 2021, the contract road freight rate recorded a YoY increase of 13.1 points, while spot road freight increased by 20.1 points YoY in 2022. A driver shortage of around 380,000-425,000 remained a significant problem in Europe. To counter some of these challenges, the European Union aims to double the modal share of rail freight by 2030 to reduce the transport sector's carbon footprint and congestion in road connections. Air cargo volume recorded growth in Europe and rose by 6.0% in December 2021 over December 2019.
- The logistics investments in Europe reached approximately USD 34 billion in H1 2022, witnessing a YoY increase of 13% in take-up driven by growth in e-commerce, which witnessed a rise by 13.3% YoY in 2021, amounting to approximately EUR 88.1 billion (USD 94.04 billion). The domestic segment of the European courier, express, and parcel market contributed 69% to the revenue generated in 2021, driven by e-commerce growth.
- The European Commission (EU) initiated the EU Mobility Package in 2020 to enhance the road transport industry in Europe. In 2022, the European Union invested around EUR 5.4 billion (USD 5.76 billion) to build sustainable, safe, and efficient transport infrastructure. The share of the online mode in retail sales is anticipated to increase to 40% in the United Kingdom and 25% in Continental Europe and drive the demand for warehouse logistics across the region over the forecast period.

Europe Freight And Logistics Market Trends

European Union allocated USD 5.76 billion to 135 transportation projects to boost economic recovery and sustainability

- The transportation and warehouse sector plays a crucial role in supporting operations across various industries, with Germany leading as the dominant player, surpassing France and the United Kingdom. Globally, Germany ranks third in both imports and exports of goods. The German federal government expressed its intention to increase investments in transportation infrastructure, allocating over EUR 12 billion (USD 12.80 billion) for federal highways and around EUR 1.7 billion (USD 1.81 billion) for waterways in 2022, thereby demonstrating its commitment to improving transportation networks.
- The German government intends to invest more in rail than road network. In 2022, Deutsche Bahn, the federal government, and the local and regional governments invested roughly EUR 13.6 billion (USD 14.51 billion) in rail infrastructure. Lower Saxony, Hamburg, Bremen, Mecklenburg-Western Pomerania, and Schleswig-Holstein are partnering with DB to invest in modernizing their rail network by 2030.
- In 2022, the European Union approved EUR 5.4 billion through grants for approximately 135 transport infrastructural projects. These projects aim to aid post-pandemic economic recovery in the EU Member States, enhance transport links, promote sustainable transportation, boost safety, and create job opportunities. All supported projects are part of the Trans-European Transport Network, which connects EU Member States and aligns with the European Union's goal of completing the TEN-T core network by 2030 and the comprehensive network by 2050, all while aligning with climate objectives outlined in the European Green Deal.

Since February 2023, diesel imports from the Middle East, Asia, and North America have increased due to the ban on imports from Russia

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- Gasoline prices surpassed EUR 2 (USD 2.13) per liter in most of the 19 eurozone countries in Q1 2022. The main reason behind the increased prices was supply issues due to the conflict between Russia and Ukraine, as Russia supplied more than a quarter of the EU's petroleum needs. In 2021, the average price for a liter of gasoline in the eurozone was EUR 1.30 (USD 1.38); at the start of 2022, the price was about EUR 1.55 (USD 1.65) per liter.
- Russia has been Europe's largest supplier of diesel. In 2023, diesel prices declined in Europe. Since February 2023, when the European Union implemented the ban on petroleum product imports from Russia, diesel exports from Russia to Europe have averaged 24,000 barrels per day (b/d), down by 96% from the 630,000 b/d Russia sent to Europe in 2022. From February through May, diesel exports to Europe increased by 51% (160,000 b/d) from the Middle East, by 97% (147,000 b/d) from Asia, and by 65% (47,000 b/d) from North America.
- Denmark is the most expensive country for petrol, and Finland is the most expensive for diesel. Austria has the cheapest petrol, and Spain is the cheapest for diesel. Fuel prices in the United Kingdom reached record highs in 2022, with the average price of petrol hitting 191.53 p-per-litre and diesel reaching 199.05 p-per-litre in July. The average cost of petrol at UK forecourts has risen to break 150p a liter (USD 1.80) since the start of 2023, and diesel has risen to 152.41p a liter (USD 1.83). Spanish fuel prices were lower than in the United Kingdom by about 20 cents per liter for petrol and 40 cents per liter for diesel in January 2023.

Europe Freight And Logistics Industry Overview

The Europe Freight And Logistics Market is fragmented, with the top five companies occupying 17.66%. The major players in this market are A.P. Moller - Maersk, DB Schenker, Deutsche Post DHL Group, DSV A/S (De Sammensluttete Vognmand af Air and Sea) and Kuehne + Nagel (sorted alphabetically).

Additional Benefits:

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

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