

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

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Report description:

The Germany Freight and Logistics Market size is estimated at USD 217.11 billion in 2024, and is expected to reach USD 262.01 billion by 2029, growing at a CAGR of 3.83% during the forecast period (2024-2029).

Rising highway construction leading to smooth transportation supply chain in country

- Germany is Europe's biggest construction market, with the continent's largest building stock. The number of enterprises in the German construction industry rose considerably at 4.7%, reaching 39.4 thousand in 2020 from 37.6 thousand in 2019. Overall, in 2021, the construction sector contributed around 6.1% to the country's GDP. Large-scale construction projects in the building and infrastructure sectors have been prominent across Germany over the past few years.
- The government of Germany is committed to strengthening the country's trade corridors, which support the supply chains, help grow the economy, ensure its recovery, and create middle-class jobs. The government is focusing on investing in the country's infrastructure and expanding its highways, expressways, and motorways, which may boost the road freight transport market in the coming years. In 2021, highway construction reached 13,192 kilometers, up from 12,996 kilometers in 2016, registering a hike of 1.51%.
- In 2020, the total investment in transport infrastructure in Germany amounted to almost USD 35.12 billion, of which 86.6% went to constructing and maintaining the traffic routes. The German federal government spent several million euros more on transport infrastructure in 2022 than in 2021. The biggest expenditure increase occurred in 2021 when the budget allocated USD 12.45 billion to federal railroads, which was more than twice the figure for 2016. In 2022, over USD 13.58 billion was allocated for federal highways and USD 1.92 billion for waterways.

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Germany Freight and Logistics Market Trends

Germany leads European logistics and transportation with USD12.80 billion investment in highways in 2022

- The German transportation industry is key to maintaining well-functioning services and moving goods within and outside the nation. The country has some of the highest-ranked infrastructural networks in the world, with its roads being some of the more heavily traveled thoroughfares in Europe. Transportation and storage recorded a high growth rate of 6.80% YoY in March 2022 and a low rate of -1.60% YoY in March 2021 due to the recovery from the pandemic and the resumption of trade with foreign countries.
- The transportation and warehouse sector's significance extends to the facilitation of operations in various other industries. Germany asserts its dominance, surpassing even the second and third-largest logistics markets, namely France and the United Kingdom. Globally, Germany holds the esteemed rank of being the third-largest both in terms of imports and exports of goods. The German federal government articulated its plans to augment investments in transportation infrastructure, signaling a commitment to allocate additional funds in 2022. This commitment materialized through an allocation exceeding EUR 12 billion (USD 12.80 billion) for federal highways and approximately EUR 1.7 billion (USD 1.81 billion) for waterways in the same year.
- The German government intends to invest more in rail than roads in order to promote environmental protection, sustainability, and effective transportation. 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, together with DB, invested in modernizing their rail networks by 2030.

Fuel prices in Germany have been rising rapidly owing to high annual inflation rate

- In January 2022, Germany's daily average diesel price was USD 1.66 per liter, almost 37 cents (USD 0.37) more than the average monthly diesel price in January 2021. The price of E10 premium petrol also followed a similar trend. In January 2022, it cost USD 1.84 a liter, 32 cents (USD 0.32) cheaper compared to January 2021. The price hike for diesel and E10 fuels can be attributed to rising oil prices. Crude oil price indicators WTI and Brent Crude hit seven-year high in 2022.
- Transport prices on Europe's roads reached an all-time high in Q4 2021, the sixth consecutive quarter recording an increase in freight rates. On the carrier side, the biggest drivers behind this development were rising fuel costs, up by 25% YoY in Germany. However, petrol and diesel fuel were more expensive in Germany than in the rest of the European Union. As the discount on fuel expired, motor fuel prices in Germany increased, with filling stations charging more for petrol and diesel fuel than those in all the EU countries bordering Germany.
- German consumers faced the fastest price rise, and the high annual inflation rate was primarily driven by extreme price increases for energy and groceries since the Russia-Ukraine War. Germany is among the world's biggest natural gas importers. Around 95% of its gas consumption is met by imports. In 2022, 55% of gas imports came from Russia, 30% from Norway, and 13% from the Netherlands. The prices of heating oil (up 87%) and natural gas (up 64.8%) increased the most, while electricity prices rose by 20.1%. Petroleum and diesel prices at the pump increased by 26.8% for drivers.

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Germany Freight Forwarders & Logistics Industry Overview

The Germany Freight and Logistics Market is fragmented, with the top five companies occupying 35.45%. The major players in this market are Dachser, DB Schenker, Deutsche Post DHL Group, DSV A/S (De Sammensluttede Vognmænd 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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