

## **Hungary Road Freight Transport - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts 2020 - 2029**

Market Report | 2024-02-17 | 150 pages | Mordor Intelligence

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### **Report description:**

The Hungary Road Freight Transport Market size is estimated at USD 4.72 billion in 2024, and is expected to reach USD 4.95 billion by 2029, growing at a CAGR of 0.99% during the forecast period (2024-2029).

Road transport is the largest contributor of freight movement in Hungary supported by well-developed infrastructure. The country has one of the dense road networks in the Central and Eastern European (CEE) region.

The market share of Hungarian road hauliers in the EU market has dropped significantly in the last five years. Despite the increase in number of hauliers by around 10% and number of vehicles by around 20% in the past five years, the EU market share of road hauliers has fallen from 4.63% to 3.7%.

According to an industrial survey, the transportation sector in the country is estimated to have experienced 10-30 percent decline in Apr 2020 due to coronavirus pandemic.

In domestic road traffic, sales of food, medicine and consumer goods did not fall significantly, however, due to the almost complete shutdown of automotive companies and the shutdown of most other industrial companies, the rate of decline was expected to be around 20%. International road traffic is expected to witness more decline - around 25-30% during the month.

Hungary Road Freight Transport Market Trends

Domestic road freight transport witness higher growth rate through the forecast period

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The domestic road freight industry (in terms of volume) has been increasing steadily with some fluctuations. The domestic road freight volume in Hungary decreased slightly in 2019 and stood at around 166 million tons.

The industrial manufacturing, automotive sectors are key sectors contributing to domestic road freight volumes. Besides, the key drivers of domestic road freight sector include growth in construction and ecommerce sectors.

The share of own accounts transport in domestic road freight is relatively more when compared to international road freight market. Around 30% of domestic road freight volume is carried by own transport vehicles.

The agriculture sector, food and beverages sector also account for significant share of road freight industry, they together account for around 40 million tons.

#### Strong automotive industry driving the growth of road freight transport sector

The industrial production is one of the major contributors of Hungarian economy and the automotive industry is one of the major sectors. The strong automotive industry is one of the key driving factor for the country's road freight transport sector and a lot of companies are engaged in automotive transportation.

Hungary is one of the most exposed economies to the automotive industry. The sector has become a critical engine of industrial production in Hungary. The automotive industry brings about around 3 to 4% of GDP and accounts for around 20% of exports.

In the past few years, the companies in the industry have managed to increase their output significantly almost every year, mainly due to lasting export demand. According to industry sources, the automotive industry's share of the manufacturing output was around 28%.

International car manufacturers (mainly Germans) see a great expansion opportunity in Hungary due to a combination of relatively low wages, good infrastructure, and substantial public subsidies offered by the government.

The growing investments in the sector also support the growth of the sector. For instance, in Dec 2019, companies from South Korea have announced investment of over EUR 200 million in Hungary's automotive sector.

#### Hungary Road Freight Transport Industry Overview

The Hungarian road freight market has a huge number of international and domestic players participating in the market making it highly competitive and fragmented. Some of the major players in the market include DHL, Gartner, and Waberer's International.

The majority of the companies in Hungarian road freight sector are small and medium-sized enterprises. These large number of SMEs account for very less share of direct orders but play an important role as subcontractors.

According to industry sources, there are around 14,000 freight carriers in the country and around only 100 companies have larger fleet. The medium and large road freight transport companies in the country are looking to develop technology and become more digitized with adoption of IoT. However, the small road freight transport companies lag in this area due to lack of capital

The companies are facing challenges with increasing operating costs, especially the small and medium enterprises.

Additional Benefits:

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

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