

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

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### **Report description:**

The Netherlands Freight And Logistics Market size is estimated at USD 73.70 billion in 2024, and is expected to reach USD 92.52 billion by 2029, growing at a CAGR of 4.65% during the forecast period (2024-2029).

Recovering trade flow since 2021 along with rising maritime volumes sustaining the economic development

- Dutch companies are developing new technologies and digital connections to create a smarter, more sustainable logistics network. These innovations are powered by 942,000 Dutch logistics specialists, comprising more than 10% of the country's workforce. During the forecast period, the sector's overall value is expected to grow.
- Freight volumes transported through waterways have increased in the country. In 2021, the volume of cargo unloaded at Dutch seaports rose by 7.5% to nearly 393 million tonnes, mainly because more dry bulk cargo, such as coal and ores (+20%), was unloaded. In 2020, this flow decreased by the same percentage. With the German steel industry picking up pace and due to the high gas price, inbound coal shipments rose by 40.5% to 40 million tonnes. Transshipments of unloaded ores increased by 25.3% to 33 million tonnes, virtually matching the level of 2019. In 2021, 3.3% more liquid bulk cargo was unloaded compared to 2020. This mainly concerned crude oil, of which 92.4 million tonnes were unloaded, representing an increase of 7.3% relative to the level in 2020. More container goods were also unloaded, with shipments rising by 6.8% in weight YoY.
- Most cargo unloaded at Dutch seaports originated from Russia, amounting to nearly 19% in 2021, mainly consisting of crude oil and petroleum products. The total flow of goods from Russia increased by 22.3% to 74 million tonnes. The other countries in the top five for unloaded cargo are (in order of weight): the United Kingdom, the United States, Norway, and Brazil. The inbound cargo shipments from all top five countries increased, except the United Kingdom, which saw a decline. This country mainly ships liquid bulk cargo to the Netherlands.

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## Netherlands Freight And Logistics Market Trends

Netherlands government USD 8 billion transportation investment plan, focusing on public transit, roads infrastructure

- Land transport and aviation faced slower growth in comparison. These sectors encompass passenger transport, which experienced the most significant decline in turnover due to the impact of COVID-19 measures. In Q3 2022, the transportation sector's GDP in the Netherlands surged to EUR 8.74 billion (USD 9.32 billion), marking a substantial rise from EUR 884 million (USD 943.66 million) recorded in Q2. Renowned for its robust export activities, the Netherlands is crucial in shipping substantial freight volumes via road and rail networks.
- The turnover of the transport sector increased by 24% in the fourth quarter of 2021 compared to the same period a year earlier. Except for postal and courier services, there was an increase in turnover in all market segments. In the fourth quarter of 2021, the turnover in water transport rose by more than 30% compared to the same period a year earlier. This increase was visible in seagoing and inland shipping, mainly due to higher prices.
- The Dutch government has outlined an ambitious plan to enhance transportation systems with a substantial investment of EUR 7.5 billion (USD 8.00 billion) over the next decade until 2030. Notably, the national government is slated to allocate EUR 4 billion (USD 4.26 billion) toward advancing public transportation endeavors. This encompasses extending Amsterdam's North-South Metro Line to Schiphol alongside a significant commitment of EUR 2.7 billion (USD 2.88 billion) for road enhancements. Additionally, an investment of EUR 780 million (USD 832.64 million) is earmarked for infrastructure upgrades to augment the network of bike lanes across the country.

Discount on fuel duty was introduced in 2022 after fuel prices surged in response to a spike in oil and gas prices on global markets

- In 2022, the retail petrol price rose above USD 2.2 per liter due to the war in Ukraine and the economic recovery after the coronavirus crisis a barrel of crude oil costs around USD 100. The crude oil price and refining costs account for roughly 30% of the pay at the pump. The fuel price in the Netherlands is in despair as petrol prices continue to rise across the country, including the cost incurred by oil companies, gas stations, and shops. The tax relief, worth 13.8 cents (USD 0.138) for a liter of petrol and 10 cents (USD 0.10) for diesel, was introduced in 2022 after prices surged to around 2.45 cents (USD 0.0245) and 2.14 cents (USD 0.0214), respectively, in response to a spike in oil and gas prices on global markets.
- The average price in December 2021 was more than USD 2.10 per liter. At the beginning of 2021, this was still about USD 1.8. The highest level was reached in November when the liter price peaked at a record USD 2.2. The prices of LPG and diesel also went to unprecedented levels in 2021. The demand for fuel prices increased after the global economy recovered from the coronavirus crisis.
- The petrol price in the Netherlands is more expensive than in almost all other countries due to excise duties. It is, therefore, a huge source of income for the state. The Netherlands has eight million motorists and around USD 4.7 billion in fuel excise and VAT annually. Prices have been steadily falling across Europe since the beginning of 2022, attributed to falling oil prices, weakening global economy. The petrol prices continue to fall at a rapid pace. In January 2023, petrol prices surged by around 14 cents (USD 0.14) a liter when the discount on fuel duty introduced in 2022 ended.

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## Netherlands Freight And Logistics Industry Overview

The Netherlands Freight And Logistics Market is fragmented, with the top five companies occupying 12.23%. The major players in this market are C.H Robinson, DB Schenker, Deutsche Post DHL Group, DSV A/S (De Sammensluttede Vognmænd af Air and Sea) and Ewals Cargo Care (sorted alphabetically).

Additional Benefits:

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

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