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Poland Freight and Logistics - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts 2020 - 2029

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Report description:

The Poland Freight and Logistics Market size is estimated at USD 34.56 billion in 2024, and is expected to reach USD 42.28 billion by 2029, growing at a CAGR of 4.11% during the forecast period (2024-2029).

The increasing consumption in the country, growth of the e-commerce sector, and a rising number of retail outlets are expected to lead to the growth of the Polish logistics market in the coming years. As in previous years, the positive development of the Polish logistics market continued in 2022.

Key Highlights
-The rapidly growing supply chain due to speculative investments has increased by almost 40% over the last two years. New technologies are continuously deployed across the Polish freight and logistics sector, changing the logistics landscape.
-One of the key features of developing transport in Poland is its geographical location. Poland lies in central Europe on the border of the European Union. It has access to the sea and is the most important European transit routes intersect. For many years, Poland has witnessed a rise in investment in developing road, rail, and air infrastructure.
-With strong investment in the industrial real estate warehousing segment, the market is experiencing favorable growth, followed by an increase in investment volume. The growth in warehouses has been a result of rapid e-commerce growth in the country. With government support and increasing investment in the freight and logistics sector, the country's market is expected to grow during the forecast period.

Poland Freight and Logistics Market Trends

Rise in Total Warehousing Space in Poland

Strong demand for warehouse and industrial space in Poland is primarily driven by the need to diversify logistics chains covering both metropolitan and smaller regional markets, as well as border areas.

E-commerce and manufacturing sectors are expected to continue to grow in the coming months. An unprecedented amount of space has been leased on a short-term basis as a result of the exponential rise of online retail. Comparing online and traditional retail chains, online retailers require three times as much storage space. The expansion in space is anticipated to continue as the Polish internet trade market grows.

A record-breaking 1.27 million square feet of warehouse space was delivered across 45 projects in the first quarter of 2022, with total supply in the following 12 months at 3.6 million square feet, a 57% year-over-year increase.

However, key vacancy rates fell to 3.3% at the end of March 2022, the lowest level since records began due to a sharp increase in demand compared to supply growth. Further, Net absorption reached a record 1.41 million square meters in Q1 2022, an increase of 85% year-on-year. The biggest year-on-year declines in vacancy were in Pomerania, Greater Poland, Lodz and Lower Silesia, Silesia, Lesser Poland and Mazovia.

In the first quarter of 2022, the developer began construction of approximately 1.5 million square feet of warehouse space, bringing the total development pipeline to 4.8 million square feet. If all upcoming projects are realized within the planned timeframe, the total inventory will increase by more than 20% in the next 12 months from the current 25 million square meters. These are the factors that are expected to drive the country's freight and logistics market.

Strong E-commerce Growth in Poland Driving the Logistics Market

Poland is an attractive market for the development of e-commerce as the number of online purchases reached an all-time high in Poland. Poland is one of the fastest-growing e-commerce markets in Europe. In 2020, online spending reached EUR 10 billion on the main product categories, i.e., clothing, consumer electronics, furniture, food, and toys. This was an increase of about 25% compared to pre-COVID levels.

The rapid growth of e-commerce is primarily driven by the expansion of omnichannel and the rising penetration rate of online retailing (share of total sales). Retailers focus on customer experience to enable convenient and quick shopping on any device. To fulfil the customer's needs, the companies are developing additional mobile sales channels. This is expected to affect return logistics and improve processing times considerably.

Polish customers have high standards for deliveries. Polish residents are the second most demanding of all the nations examined, with 25% expecting their online purchases to arrive within 1-2 days, according to a poll by international media. Just 5% are willing to wait more than six days, while 67% anticipate getting their things within three to five days. Hence, sellers who wish to grow their market share in Poland must be aware of delivery deadlines and select a logistics provider with a solid track record for prompt delivery. Further, Poland's strategic location at the crossroads of major transport routes, rise in investments to improve its transport infrastructure, and the growth of urban and cross-border logistics is expected to drive the market through teh forecast period.

Poland Freight and Logistics Industry Overview

The competitive landscape of the Polish freight and logistics market shows high levels of fragmentation. Some of the major players in the market are PKP Cargo, DPD Group, LOTOS, DHL, Kuehne + Nagel, FedEx, and DB Schenker. The major competition is observed in Poland's road freight and warehousing segment.

Additional Benefits:

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

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