

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

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Report description:

The Spain Freight and Logistics Market size is estimated at USD 73.94 billion in 2024, and is expected to reach USD 92.52 billion by 2029, growing at a CAGR of 4.59% during the forecast period (2024-2029).

Rising infrastructure development leading to smooth flow of goods in domestic territory, leading to vehicle sales

- In 2020, road freight transport witnessed a decline due to the COVID-19 pandemic, which led Spain to witness its sharpest fall of 29.3% in the European Union in the sales of new commercial vehicles. To tackle the downfall and provide support to truckers, Spain's government unveiled a USD 1.07 billion plan to reduce fuel prices amid an unprecedented strike by lorry drivers.
- To further facilitate the smooth flow of goods in the domestic territory, infrastructure development has been a focus segment for the country. The Community of Madrid invested a total of USD 255 million in the Road Maintenance Strategy, in the period between 2018-2021, with several extensions until September 2022, which will be used to asphalt almost 1,200 kilometers of the road network, which would induce the growth of domestic road freight transport market in Spain.
- Continued growth in the construction industry is expected over the next few years, supported by road and rail infrastructure expansion. All sectors, including housing, non-residential construction, and civil engineering, are expected to expand in volume. Spain focuses on implementing a series of measures to guarantee compliance with the Sustainable Development Goals for 2030, which require the improvement of the infrastructure system, and the necessary investment amounted to USD 116.84 billion.

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Transport and logistics sector dominates 7.9% of Spain's GDP, fueled by USD 25.83 billion infrastructure investment

- In 2021, the transport and storage sector witnessed one of the best-recorded growth rates within the economy, only surpassed by wholesale trade and intermediaries (19.2%) and the hotel industry (34.8%). All service activities have raised their indicators, which has allowed the turnover of the sector to increase, as a whole, by 15.5%. As per the Spanish Institute for Foreign Trade (ICEX), in 2022, the transport and logistics industry accounted for 7.9% of Spain's GDP, expected to rise to 10% if the logistics operations of industrial, commercial, and service firms were included. Almost one million jobs are created by this industry, which has a current turnover of EUR 111 billion (USD 118.491 billion) and a high business concentration of about 197,000 companies.
- In 2022, transport and storage was the domain that saw the most substantial expansion in May, an activity that experienced the greatest growth. Within this sector, the monthly growth rate surged by 5.4% compared to April, adjusting for both seasonal and calendar effects. The data revealed that the growth for transport and storage activities surpasses the general index by 2.9 points, as the latter recorded a growth rate of 2.5% in the same period.
- The government develops, maintains, and renews railway infrastructure and establishes the financial framework and priorities for action on the railway network to meet future mobility needs, system sustainability, and achieve a single European railway area. The Spanish government also has plans to mobilize EUR 24.2 billion (USD 25.83 billion) in investments between 2021 and 2026 to draw the first step of railway planning to constitute a coherent and effective system that incorporates social, environmental, and economic efficiency.

Owing to high fuel prices, a discount of USD 0.2 per liter was applied to the retail price as a subsidy by the Spanish government in 2022

- In Spain, gasoline and diesel costs are still significantly higher than before the Russian invasion of Ukraine. Due to the Russian invasion of Ukraine, the price of gasoline increased by 1.47% and diesel by 1.33% in 2022. From April 2022 to December 2022, the Spanish government subsidized fuel prices. A discount of 20 cents (USD 0.2) per liter was applied to the retail price. In August 2022, petrol and diesel prices were still below the EUR 2 (USD 2.13) per liter threshold. During May-August 2023, gasoline prices in Spain remained unchanged at USD 1.87 per liter. The broader fuel and energy market suffered price shocks, and rising costs have been passed down to consumers.
- Gasoline and diesel prices skyrocketed throughout Europe due to the increased demand for oil in 2021. The price of a barrel of Brent, a reference in the European Union, increased by 53% in 2021, leading fuels to record highs in European countries. Among European countries, fuel prices in Spain grew substantially, and gasoline and diesel prices increased by 26.2% and 27.6% in 2021, respectively, above the EU average in neighboring countries, such as France, Holland, Italy, and Portugal.
- The EU Oil Bulletin certified that a liter of gasoline in Spain was sold at an average price of USD 1.71 and diesel at USD 1.56 in the second week of November 2021. The increase of 26.2% for gasoline and 27.6% for diesel in 2021 was higher than those registered in France, Italy, and Portugal. Since February 2022, Spain has experienced the highest oil prices among the major Eurozone economies. In the case of gasoline, only five of the nine countries (Slovenia, Malta, Cyprus, Lithuania, and Austria) have lower rates than Spain.

Spain Freight & Logistics Industry Overview

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The Spain Freight and Logistics Market is fragmented, with the top five companies occupying 6.38%. The major players in this market are DB Schenker, Deutsche Post DHL Group, DSV A/S (De Sammensluttede Vognmand af Air and Sea), FedEx and Kuehne + Nagel (sorted alphabetically).

Additional Benefits:

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

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