

Sweden Freight And Logistics - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts 2020-2029

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Report description:

The Sweden Freight And Logistics Market size is estimated at USD 42.02 billion in 2024, and is expected to reach USD 49.69 billion by 2029, growing at a CAGR of 3.41% during the forecast period (2024-2029).

Key Highlights

- The logistics market in Sweden is the largest in the Scandinavian region. Investments in infrastructure have made the country one of the top logistics markets in Europe and the World. The central location in the region makes it the preferred choice for companies that are looking to consolidate distribution and warehousing activities in Northern Europe into one central location. Foreign companies use some 10 Swedish locations for centralized distribution in Northern Europe.
- The Swedish economy is highly dependent on exports of goods. The strong cross-border impacts on the transportation industry and logistics market. Gothenburg is a leading logistics location in the country, supported by the Port of Gothenburg and new logistics establishments. The Port of Gothenburg has a 53% share of the Swedish container market, which is an increase of three percentage points compared with the first half of 2021. The Port of Gothenburg also increased its market share for containers compared with nearby major ports in Northern Europe.
- 10% of consumers indicated that they had made online purchases from outside of Sweden, with six out of ten of these purchases originating in Germany, China, and the United Kingdom. Germany has experienced a surge in online shopping from Sweden, with 32% of online purchases originating from outside of the country, second only to China at 15%. Germany is particularly popular due to its automotive industry, which produces a substantial amount of affordable spare parts and accessory imports.
- The cleantech, ICT, life sciences, automotive, and materials science industries are some emerging industries in Sweden. E-commerce and retail are also fast-growing sectors in the country, which are expected to boost the logistics demand, especially in the warehousing sector.

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Sweden Logistics Market Trends

Growth in the rail freight segment

The share of new entrants in the Swedish rail freight sector has significantly increased. The vertical separation of the Swedish rail industry between infrastructure and train operations is often regarded as highly successful, bringing the benefits of competition. The Swedish government has established that new main lines are needed between Stockholm, Gothenburg, and Malmo. To increase opportunities for sustainable and reliable passenger and freight transport by rail, the Swedish Transport Administration is planning and building new main lines. The new main lines will be made in stages, with the first three being the East Link, Gothenburg-Boras, and Hassleholm-Lund.

The rail freight sector in the country faces high competition from the road freight industry. The Shift2Rail initiative is based on digitalization, enabling various levels of automation and intelligence in the rail system, and it involves an investment of about SEK 8 million (USD 0.76 million). Multimodality is a required field where also ITS solutions/applications are developed. More than 60% of the containers handled in the port are transported by rail, and around 70 trains arrive and depart from the Port of Gothenburg daily. Also, the rail-port intermodal concept of the port contributes to significant emission reduction. One subproject is about intelligent video gates (IVG) capturing data with the help of optics and RFID, enabling better information sharing and operational planning in, e.g., intermodal terminals.

Growing e-commerce accelerating the demand for logistics facilities

E-commerce revenue in Sweden in 2022 was estimated to be around 136 billion kronor (USD 12.24 billion), which is more than 12 billion euros (USD 12.86 billion) in comparison to the previous year. User penetration stood at the level of 74.8%, and by the end of 2025, it is expected to hit 81.8%. About 8 million people shop online in Sweden, which is quite a lot considering that the country has only ten million people. This means that many Swedes depend on digital commerce to fulfill their shopping needs. Online shopping is convenient because it is available 24 hours a day, 7 days a week, and at lower prices than in-person shopping.

According to e-commerce demographics, geography, age, and income play a role in online shopping. Younger generations purchased more online in 2022 than older generations did in the past. Women aged 25-34 bought the most online, while older men aged 35-44 did the same. All eight national regions were highly familiar with online shopping. However, Western Sweden has the largest number of online shoppers. When we look at income levels, we see that the higher your disposable income, the more likely you are to shop online. More than 80 percent of shoppers who had the highest disposable income bought online, compared to 55 percent who had the lowest disposable income.

Sweden Logistics Industry Overview

Sweden's freight and logistics market is fragmented, with many international and domestic players active. The distribution network comprises many freight forwarders and third-party logistics (3PL) companies. Some prominent players in the market include DHL, DB Schenker, DSV, Greencarrier, Geodis, and PostNord. Technologies such as automation, Big Data, and analytics are expected to play a significant role in the Swedish logistics market.

Additional Benefits:

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

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