

Europe Cross Border Road Freight Transport - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)

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Report description:

The Europe Cross Border Road Freight Transport Market size is estimated at USD 184.10 billion in 2025, and is expected to reach USD 221.30 billion by 2030, at a CAGR of 3.74% during the forecast period (2025-2030).

The European automotive vehicle market is expected to record a CAGR of 3.38% from 2020 to 2030

- The European automotive industry has been booming and is expected to become a global leader and driver of Europe's growth and prosperity in the future. In addition, the European automotive vehicle market is expected to record a CAGR of 3.38% from 2020 to 2030 and reach 21.59 million units by 2030. As a result, it is expected to drive the market's growth. Moreover, the Made in Europe partnership aims to reinforce the European manufacturing global position in terms of competitiveness, sustainability, and technological leadership over the coming years.
- Brexit occurred on January 1, 2021, which led to increased border constraints, and several retailers and businesses were forced to reduce or delay their deliveries from the United Kingdom. The consequences of Brexit were also felt in France as several customers encountered delivery troubles for other online orders and experienced delays in receiving their Christmas parcels in 2021. However, the total retail trade sales volume index in the European Union increased by 5.47% in 2021 compared to the previous year.
- The construction segment of the European cross-border road freight transport market is expected to grow in line with the Swedish construction industry, which is anticipated to grow by an average of 2.1% annually between 2022 and 2025, with continued growth in the infrastructure and residential industries offsetting a decline in the commercial sector. Between 2022 and 2025, the construction market in Spain is also anticipated to rise by more than 4% annually. One of the factors expected to drive the growth of the agriculture, forestry, and fishing segment is that milk production in the European Union is projected to grow at

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0.5% per year and reach around 162 million tons by 2031.

The cross border B2C e-commerce market is increasing the demand for cross border transportation in Europe

- The Nordic cross border business-to-consumer (B2C) e-commerce market is booming. The foreign share of B2C e-commerce in Sweden out of the total e-commerce revenue is the highest, amounting to 49.4% of the total market share in 2022. Similarly, cross-border e-commerce has been a major facilitator for the growth of Spain's international road freight transport market. For instance, in 2021, the international road freight transport market recovered as most online shopping registered in Spain was cross border. In 2021, 55.4% of online shopping was done from e-commerce websites outside Spain. Also, over 55% of Italian businesses used e-commerce to sell goods abroad. Italian businesses primarily sold to other EU countries, with France accounting for a 24% share, followed by Spain with 22% and Germany with 21%.
- In terms of transborder transportation, the UK has strong cross border relations with other European countries. In 2022, 6.6 million tons of goods were handled by UK-registered HGV vehicles internationally to/from the United Kingdom, registering a growth of 26% YoY. In 2022, China was one of the major trading partners of Russia. In the same year, China-Russia trade exceeded USD 190 billion, registering a growth of 29.3% YoY.
- The UK government has created a plan of action to move toward electric trucks and achieve net zero emissions from road freight by 2040. It also aims to end the sale of new non-zero emission heavy goods vehicles ranging in weight from 3.5-26 tons by 2035 and all new non-zero emission HGVs by 2040. To support the projected production of roughly 2 million electric and hybrid vehicles, the French government is investing EUR 2.5 billion (USD 2.66 billion) to strengthen the road freight industry within the framework of the France 2030 investment plan.

Europe Cross Border Road Freight Transport Market Trends

European Union allocated USD 5.76 billion to 135 transportation projects to boost economic recovery

- The transportation and warehouse sector plays a crucial role in supporting operations across various industries, with Germany leading as the dominant player, surpassing France and the United Kingdom. Globally, Germany ranks third in both imports and exports of goods. The German federal government expressed its intention to increase investments in transportation infrastructure, allocating over EUR 12 billion (USD 12.80 billion) for federal highways and around EUR 1.7 billion (USD 1.81 billion) for waterways in 2022, thereby demonstrating its commitment to improving transportation networks.
- The German government intends to invest more in rail than road network. In 2022, Deutsche Bahn, the federal government, and the local and regional governments invested roughly EUR 13.6 billion (USD 14.51 billion) in rail infrastructure. Lower Saxony, Hamburg, Bremen, Mecklenburg-Western Pomerania, and Schleswig-Holstein are partnering with DB to invest in modernizing their rail network by 2030.
- In 2022, the European Union approved EUR 5.4 billion through grants for approximately 135 transport infrastructural projects. These projects aim to aid post-pandemic economic recovery in the EU Member States, enhance transport links, promote sustainable transportation, boost safety, and create job opportunities. All supported projects are part of the Trans-European Transport Network, which connects EU Member States and aligns with the European Union's goal of completing the TEN-T core network by 2030 and the comprehensive network by 2050, all while aligning with climate objectives outlined in the European Green Deal.

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Since February 2023, diesel imports from the Middle East, Asia, and North America have increased due to the ban on imports from Russia

- Gasoline prices surpassed EUR 2 (USD 2.13) per liter in most of the 19 eurozone countries in Q1 2022. The main reason behind the increased prices was supply issues due to the conflict between Russia and Ukraine, as Russia supplied more than a quarter of the EU's petroleum needs. In 2021, the average price for a liter of gasoline in the eurozone was EUR 1.30 (USD 1.38); at the start of 2022, the price was about EUR 1.55 (USD 1.65) per liter.
- Russia has been Europe's largest supplier of diesel. In 2023, diesel prices declined in Europe. Since February 2023, when the European Union implemented the ban on petroleum product imports from Russia, diesel exports from Russia to Europe have averaged 24,000 barrels per day (b/d), down by 96% from the 630,000 b/d Russia sent to Europe in 2022. From February through May, diesel exports to Europe increased by 51% (160,000 b/d) from the Middle East, by 97% (147,000 b/d) from Asia, and by 65% (47,000 b/d) from North America.
- Denmark is the most expensive country for petrol, and Finland is the most expensive for diesel. Austria has the cheapest petrol, and Spain is the cheapest for diesel. Fuel prices in the United Kingdom reached record highs in 2022, with the average price of petrol hitting 191.53 p-per-litre and diesel reaching 199.05 p-per-litre in July. The average cost of petrol at UK forecourts has risen to break 150p a liter (USD 1.80) since the start of 2023, and diesel has risen to 152.41p a liter (USD 1.83). Spanish fuel prices were lower than in the United Kingdom by about 20 cents per liter for petrol and 40 cents per liter for diesel in January 2023.

Europe Cross Border Road Freight Transport Industry Overview

The Europe Cross Border Road Freight Transport Market is fragmented, with the top five companies occupying 3.63%. The major players in this market are Dachser, DB Schenker, DHL Group, DSV A/S (De Sammensluttede Vognmænd af Air and Sea) and XPO, Inc. (sorted alphabetically).

Additional Benefits:

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

Table of Contents:

1 EXECUTIVE SUMMARY & KEY FINDINGS

2 REPORT OFFERS

3 INTRODUCTION

3.1 Study Assumptions & Market Definition

3.2 Scope of the Study?

3.3 Research Methodology

4 KEY INDUSTRY TRENDS

4.1 GDP Distribution By Economic Activity

4.2 GDP Growth By Economic Activity

4.3 Economic Performance And Profile

4.3.1 Trends in E-Commerce Industry

4.3.2 Trends in Manufacturing Industry

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4.4 Transport And Storage Sector GDP

4.5 Logistics Performance

4.5.1 Albania

4.5.2 Bulgaria

4.5.3 Croatia

4.5.4 Czech Republic

4.5.5 Denmark

4.5.6 Estonia

4.5.7 Finland

4.5.8 France

4.5.9 Germany

4.5.10 Hungary

4.5.11 Iceland

4.5.12 Italy

4.5.13 Latvia

4.5.14 Lithuania

4.5.15 Netherlands

4.5.16 Nordics

4.5.17 Norway

4.5.18 Poland

4.5.19 Romania

4.5.20 Russia

4.5.21 Slovak Republic

4.5.22 Slovenia

4.5.23 Spain

4.5.24 Sweden

4.5.25 Switzerland

4.5.26 United Kingdom

4.6 Length Of Roads

4.7 Export Trends

4.8 Import Trends

4.9 Fuel Pricing Trends

4.10 Trucking Operational Costs

4.11 Trucking Fleet Size By Type

4.12 Major Truck Suppliers

4.13 Road Freight Tonnage Trends

4.14 Road Freight Pricing Trends

4.15 Modal Share

4.16 Inflation

4.17 Regulatory Framework

4.18 Value Chain & Distribution Channel Analysis

5 MARKET SEGMENTATION (includes market size in Value in USD, Forecasts up to 2030 and analysis of growth prospects)

5.1 End User Industry

5.1.1 Agriculture, Fishing, and Forestry

5.1.2 Construction

5.1.3 Manufacturing

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- 5.1.4 Oil and Gas, Mining and Quarrying
- 5.1.5 Wholesale and Retail Trade
- 5.1.6 Others
- 5.2 Country
 - 5.2.1 France
 - 5.2.2 Germany
 - 5.2.3 Italy
 - 5.2.4 Netherlands
 - 5.2.5 Nordics
 - 5.2.6 Russia
 - 5.2.7 Spain
 - 5.2.8 United Kingdom
 - 5.2.9 Rest of Europe

6 COMPETITIVE LANDSCAPE

- 6.1 Key Strategic Moves
- 6.2 Market Share Analysis
- 6.3 Company Landscape
- 6.4 Company Profiles
 - 6.4.1 C.H. Robinson
 - 6.4.2 Dachser
 - 6.4.3 DB Schenker
 - 6.4.4 DHL Group
 - 6.4.5 DSV A/S (De Sammensluttede Vognmænd af Air and Sea)
 - 6.4.6 Nippon Express Holdings.
 - 6.4.7 NYK (Nippon Yusen Kaisha) Line
 - 6.4.8 Rhenus Group
 - 6.4.9 XPO, Inc.

7 KEY STRATEGIC QUESTIONS FOR ROAD FREIGHT CEOS

8 APPENDIX

- 8.1 Global Logistics Market Overview
 - 8.1.1 Overview
 - 8.1.2 Porter's Five Forces Framework
 - 8.1.3 Global Value Chain Analysis
 - 8.1.4 Market Dynamics (Market Drivers, Restraints & Opportunities)
- 8.2 Sources & References
- 8.3 List of Tables & Figures
- 8.4 Primary Insights
- 8.5 Data Pack
- 8.6 Glossary of Terms
- 8.7 Currency Exchange Rate

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