

Europe Customs Brokerage - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)

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Report description:

The Europe Customs Brokerage Market size is estimated at USD 28.80 billion in 2025, and is expected to reach USD 38.20 billion by 2030, at a CAGR of 5.81% during the forecast period (2025-2030).

Key Highlights

- The volume of EU goods exports and imports decreased in Q3 2023, with a decrease of 4.6% (YoY) and 1.2% (RuY), respectively, compared to Q1 2023. The volume of EU exports in goods decreased for a third consecutive quarter, while imports decreased for a fourth consecutive quarter.
- The surplus in the EU's trade balance remained at around EUR 18 billion (USD 19.75 billion), with a surplus of EUR 6.9 billion (USD 7.57 billion) recorded in Q3 2021.
- Other manufactured goods imports decreased by EUR 6.6 billion (USD 7.24 billion) in the Q3 of 2023 compared to the Q2 of 2023, followed by machinery and vehicles at EUR 6.2 billion (USD 6.80 billion) and energy at EUR 4.7 billion (USD 5.16 billion).
- Exports decreased in the machinery and vehicles group by EUR 6.9 billion (USD 7.57 billion) and in the other manufactured goods group by EUR 2.7 billion (USD 2.96 billion). At the same time, energy and chemicals increased by EUR 3.4 billion (USD 3.73 billion) and EUR 3.2 billion (USD 3.51 billion), respectively.
- In the energy sector, the trade deficit has been on a declining trend since Q3 of 2022, when it reached a record low of -EUR 193.8 billion (USD 212.65 billion). The main reason for this was falling energy prices in Q3 of 2023, which contributed to the decrease in the trade deficit.

Europe Customs Brokerage Market Trends

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Germany Driving the Growth of the Market

- In addition to having the biggest economy in Europe and the fourth-largest economy in the world, Germany is the third-largest producer in the world.
- After adjusting for calendar and seasonality, the volume of goods exported by Germany totaled EUR 126,5 billion (USD 138.63 billion), and the volume of goods imported totaled EUR 110,0 billion (USD 120.55 billion) in September 2022.
- The trade balance recorded a surplus of EUR 16,5 billion in September 2022 compared with a surplus of EUR 17,7 billion (USD 19.40 billion) recorded in August 2022 and EUR 5,0 billion (USD 5.48 billion) recorded in September 2022.
- Germany exported goods to the EU Member States in September 2023 worth EUR 69.8 billion while importing goods from these countries worth EUR 58.7 billion (USD 64.19 billion). Calendar and seasonally adjusted, exports to EU countries decreased by 2.1%, while imports decreased by 2.6% compared to August 2023.
- In September 2023, the value of goods exported to euro-zone countries totaled EUR 48.8 billion (USD 53.48 billion) (-2.4%), while the value of goods imported from euro-area countries totaled EUR 38.9 billion (USD 42.63 billion) (-3.4%). On the other hand, goods to the EU were exported worth EUR 20.9 billion (USD 22.90 billion) (-1.3%), while the value of imports from non-euro-zone countries was EUR 19.8 billion (USD 21.70 billion) (-0.2%).
- The volume of goods exported to third countries outside the European Union (EU) totaled EUR 56.7 billion (USD 62.14 billion in September 2022, while imports totaled EUR 51.3 billion (USD 56.22 billion), both calendar- and seasonally-adjusted. Compared to August 2022, third-country exports decreased by EUR 2,8 billion (USD 3.07 billion), while imports decreased by EUR 0,6 billion (USD 0.66 billion).
- The majority of German exports were made to the United States. After adjusting for seasonal and calendar adjustments, the value of goods exports to the US decreased by EUR 4,0 billion (USD 4.38 billion) compared to August 2022, with exports to the US dropping to EUR 12.8 billion (USD 13.57 billion). The volume of goods exports to China decreased by EUR 7.3 billion (USD 8 billion) to EUR 7.7 billion (USD 8.44 billion). In contrast, exports to the UK increased by EUR 2.3 billion (USD 2.3 billion) to EUR 6.7 billion (USD 7.34 billion).
- In September 2023, the People's Republic of China accounted for the majority of imports, with goods valued at EUR 13,0 billion (USD 14.25 billion). After calendar and seasonal adjustments, this represents a decrease of EUR 0.7 billion (USD 0.77 billion) compared to the previous month. The United States increased imports by EUR 0.5 billion (USD 0.55 billion) to EUR 7.7 billion (USD 8.44 billion).
- The United Kingdom increased imports by EUR 5.2 billion (USD 5.70 Billion) to EUR 3,2 billion (USD 3.51 billion) in the same month. On the other hand, imports from the Russian Federation decreased by EUR 11.2 billion (USD 12.27 billion) in September 2023, compared to a decrease of EUR 11.4 billion (USD 12.49 billion) in the month before. Compared to the month before, exports to Russia decreased by EUR 41.7 billion (USD 45.70 billion). At the same time, imports from Russia increased by EUR 7.5 billion (USD 8.22 billion) from the month before and decreased by EUR 89.4 billion (USD 97.97 billion) compared to the month before.

Sea Transport Dominates the Market

- Shipping has long been a key driver of economic growth and prosperity for Europe. Maritime Transport facilitates trade and links between all European countries. Energy, food, and commodity supply are safeguarded, and maritime transport is the main means of import and export into the EU and beyond.
- Seaborne accounts for almost 90% of external freight trade in the EU, and short sea shipping accounts for one-third of EU exchanges in ton-kilometres. Good maritime transport services are essential for the quality of life in Europe's islands and peripheral maritime regions.
- Over 400 million passengers arrive and leave at European ports each year. In general, maritime industries provide employment and income to the European economy.

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- EU ports handled 3,5 billion tonnes of goods in 2022, which is slightly higher than in 2021 (-0.8% YoY). After a significant drop in 2020, which is most likely due to the pandemic and restrictions imposed across the EU and globally, the levels in 2022 are slightly lower than in 2018.
- EU port freight activity showed a positive trend since 2014, suggesting a slight recovery after the 2009 economic crisis. After a drop in the first quarter of 2021 when compared to the same quarter in 2020, there was a clear increase in the last three quarters of 2021 and the first two quarters of 2022. However, there was a decrease in activity in the final two quarters of 2022, with a drop in activity (-0.1% YoY in the 3rd quarter and (-2.2%) in the 4th quarter.
- In terms of maritime freight transport, the Netherlands maintained its position as the largest country in Europe for maritime freight transport in 2022, with the other seven largest ports in Europe being Rotterdam (Netherlands), Antwerp (Bruges), Hamburg (Hamburg), Amsterdam (Amsterdam-Munich), Algeciras (Harpo[2]) and Marseille (Marseille).
- In terms of seaborne cargo-to-capita ratios, EU Member States ranged from 33.3 Tfc in the Netherlands in 2022 to 3.2 Tfc in Poland (Romania) and the EU average of 7.8 Tfc in 2022. However, Norway, an EFTA country, had the highest ratio (39.4 Tfc) of maritime data reporting countries to Eurostat in 2022.

Europe Customs Brokerage Industry Overview

The market for customs brokerage in Europe is fragmented in nature. With a large number of customs brokers operating in the market, the competition is high. The major players in the market include DHL Logistics, Maersk Logistics, Kuehne and Nagel Logistics, United Parcel Services, DB Schenker, etc.

The companies have built a strong reputation and have a wide network of clients and partners. They often have extensive experience in handling customs procedures across different European countries, making them a reliable choice for businesses.

Additional Benefits:

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

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