

Europe Freight And Logistics - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)

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Report description:

The Europe Freight And Logistics Market size is estimated at USD 1.48 trillion in 2025, and is expected to reach USD 1.74 trillion by 2030, at a CAGR of 3.31% during the forecast period (2025-2030).

Rising investments, including USD 15 billion, from the German government are developing the market

- The United Kingdom aims to have zero emissions from new heavy goods vehicles by 2040. The UK electric truck market is expected to record a CAGR of 70% during 2020-2026, reaching 2,167 units in 2026. In 2022, Amazon launched 5 electric heavy goods vehicles (HGVs) in its delivery fleet, covering 100,000 annual road miles to cut down over 170 tonnes of carbon emissions. The country is working toward installing a nationwide network of overhead wires to power long-distance electric trucks as part of efforts to decarbonize the transportation sector by 2050.
- In 2020, Germany witnessed a significant investment of nearly USD 35.12 billion in its transport infrastructure, with a major chunk, 86.6%, allocated to the construction and maintenance of traffic routes. The German federal government's spending on transport infrastructure saw a notable uptick in 2022 compared to 2021. Of particular significance was the allocation of USD 12.45 billion to federal railroads in 2021, more than double the amount allocated in 2016. In 2022, the budget allocated over USD 13.58 billion for federal highways and USD 1.92 billion for waterways.
- The French government has outlined its infrastructure spending plans until 2028, with a significant focus on highways, earmarking investments worth EUR 5.1 billion (USD 5.44 billion). As part of the ambitious France 2030 investment plan, the government has committed EUR 2.5 billion (USD 2.66 billion) to bolster the production of nearly two million electric and hybrid vehicles by 2030. In 2022, the government also initiated a call for projects to facilitate the deployment of high-power charging stations for electric vehicles. These strategic moves by the French government are poised to bolster the growth of short-haul

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trucking in the country.

Cross-border e-commerce is driving growth and transforming freight and logistics in Europe

- The German government has allocated a financial support package of USD 626 million to bolster the supply chain operations in the country's 15 key airports. Out of this, USD 426 million is earmarked for smaller airports, specifically for air navigation services and traffic control infrastructure. With a target of achieving net-zero climate emissions by 2045, Germany recognizes the significance of decarbonizing its transportation sector, which currently accounts for about 20% of the nation's emissions. This focus on sustainability is further underscored by heightened industry awareness, with the Luftfahrt-Bundesamt (LBA) serving as Germany's national authority overseeing environmental, security, safety, and personnel matters in civil aviation.
- In 2023, UK-based rail company Colas Rail made its foray into the French market by launching a new subsidiary, Colas Rail Traction, which recently obtained its rail license. Headquartered in Louveciennes, west of Paris, the subsidiary is set to employ a workforce of 140. Colas Rail Traction's core operations will revolve around the transportation of machinery, work trains, and freight, complementing its existing subsidiary, Colas Rail France, which specializes in rail design, construction, and maintenance.
- The UK's CEP (Courier, Express, and Parcel) industry witnessed a significant surge, with the number of enterprises rising from 12,550 in 2012 to 39,165 in 2021, marking an impressive annual growth rate of 13.48%. With e-commerce projected to reach a penetration rate of 90% by 2025, CEP companies are poised to capitalize on the expanding online consumer market. Notably, clothing and gadgets are among the top products UK consumers prefer to order online.

Europe Freight And Logistics 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.

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

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- In France, 2023 ended with a litre of SP95-E10 priced at USD 1.96 and diesel at USD 1.93. TotalEnergies (the French oil company giant) announced that it will keep a 1.99 euro per liter cap on French fuel prices throughout 2024. Moreover, in 2023, gas consumption in Germany dropped by 5% compared to 2022. While compared to the average consumption in the period 2018 to 2021, gas demand in Germany fell by 17.5%. Furthermore, 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.
- 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. Moreover, Germany anticipates a fuel price jump from 2027 EU emissions trading. An increase of 38 cents per liter of petrol and around 3 cents per kilowatt hour of natural gas at the beginning of 2027 compared to 2026.

Europe Freight And Logistics Industry Overview

The Europe Freight And Logistics Market is fragmented, with the top five companies occupying 10.02%. The major players in this market are A.P. Moller - Maersk, DB Schenker, DHL Group, DSV A/S (De Sammensluttede Vognmænd af Air and Sea) and Kuehne + Nagel (sorted alphabetically).

Additional Benefits:

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

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