

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

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Report description:

The Nordics Road Freight Transport Market size is estimated at 31.17 billion USD in 2025, and is expected to reach 37.19 billion USD by 2030, growing at a CAGR of 3.60% during the forecast period (2025-2030).

The Nordic e-commerce market is growing rapidly, driving demand for road freight services

- The manufacturing sector is a significant contributor to the Finnish economy in the Nordics, accounting for about half of Finland's exports and almost 30% of the GDP. The manufacturing sector is the backbone of the Finnish economy, employing 300,000 people directly and 700,000 people in total, or about 30% of the entire Finnish labor force. The technology industry makes up 51% of Finnish exports. The major branches of the manufacturing sector in Finland include the metal industry, with a 37% share, and the chemical industry, with 26%. Some of the top manufacturing companies in Helsinki, Finland, include ABB, Siemens, Wartsila, Unilever, Nissan, Eaton, and L'Oreal.
- Denmark, Finland, Norway, and Sweden quickly embraced the Internet, bolstered by their advanced digital infrastructures. While online shopping enjoys popularity in the Nordics, studies indicate significant growth potential. Projections suggest the region's e-commerce market will expand at a CAGR of 8.67% from 2023 to 2027, potentially hitting a valuation of USD 55.97 billion. Furthermore, e-commerce user numbers are set to climb to 21.2 million by 2027. This growth in e-commerce is expected to drive increased demand for road freight services to support the transportation of goods across the region.

Sweden leading the Nordics road freight market in terms of value

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- Norwegian grocery wholesaler ASKO aims for a zero-emission truck fleet by 2026, already operating over 60 electric trucks. In 2023, ASKO and Scania introduced four hydrogen gas trucks in Trondheim. The Norwegian government's National Transport Plan (2022-2033) aims to create an eco-friendly, efficient transport system by 2050, focusing on road freight infrastructure and supporting 25.25-meter modular trucks by 2033. The plan aims for all heavy vehicles to be zero-emission by 2040, cutting CO2 emissions by 4.4 million tons, or 9% of Norway's annual emissions.
- A part of the 2023-2030 investment program comprises 29 core infrastructure improvement projects, 14 improvement projects in the rest of the road network, and around 50 basic infrastructure improvement projects. In 2023, Posti, the national postal operator of Finland, introduced the first-of-its-kind electric truck, a semi-trailer truck, and aims to increase the electric truck fleet to 10. The Icelandic government announced measures to phase out all fossil fuels throughout the energy sector, including the road transport sector, by 2050.

Nordics Road Freight Transport Market Trends

Sweden dominates the GDP of the Nordic transport sector, fueled by modern logistics infrastructure

- The European Commission granted USD 41.74 million to 11 projects in Finland through the Connecting Europe Facility (CEF). Five government projects received USD 21.52 million, and six private sector projects got USD 20.23 million. The CEF Transport Committee made the allocations in July 2024, ultimately awarding USD 7.48 billion to 134 projects out of over 400 applications requesting more than USD 23.48 billion. The Commission focuses on funding projects that are well-prepared for planning and implementation.
- Denmark's initiative, "Denmark Forward," pledges DKK 160 billion (USD 23.68 billion) towards infrastructure development by 2035. This investment aims to enhance the nation's road and railway systems, directly benefiting both citizens and businesses. Meanwhile, Norway has ramped up its public investments in transportation, a move poised to yield substantial economic advantages. This is particularly crucial as robust transportation infrastructure can facilitate Norway's shift from oil-centric activities.

Owing to the impact of the Russia-Ukraine war on fuel prices globally, fuel prices in the Nordic countries are rapidly increasing

- Petrol and diesel prices in Sweden have dropped due to two changes that started in early 2024, a tax cut and a reduction in the greenhouse gas reduction mandate. These cuts were part of election promises by the governing parties and the Sweden Democrats but have faced criticism for potentially increasing carbon emissions. Major fuel chains continued to lower prices through July 2024, with 95-octane petrol dropping by 25 ore to SEK 17.94 (USD 1.71) per liter, the lowest since mid-January. Diesel prices also fell by the same amount to SEK 17.54 (USD 1.67) per liter.
- In January 2024, Denmark launched the Green Fuels Alliance India (GFAI) initiative to strengthen cooperation between Denmark and India in sustainable energy solutions and achieve carbon neutrality while stabilizing fuel prices in Denmark. Key players include Maersk, Topsoe, and Novozymes. Denmark, recognized for its environmental efforts, also ranked 1st in the global Climate Performance Ranking 2024 and aims to achieve carbon neutrality by 2050. These initiatives have led to increased GDP growth forecast to 2.4% for 2024.

Nordics Road Freight Transport Industry Overview

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The Nordics Road Freight Transport Market is fragmented, with the major five players in this market being Danske Fragtm?nd AS, Deutsche Bahn AG (including DB Schenker), DFDS Logistics, FREJA and NTG Nordic Transport Group AS (sorted alphabetically).

Additional Benefits:

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

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