

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

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Report description:

The Poland Freight and Logistics Market size is estimated at 52.05 billion USD in 2025, and is expected to reach 59.62 billion USD by 2030, growing at a CAGR of 2.75% during the forecast period (2025-2030).

Infrastructure projects drive increasing demand for land freight transport services

- In October 2024, Erli, Poland's second-largest online marketplace, partnered with DPD to launch the Erli DPD Kurier service for efficient e-commerce deliveries, available to all registered e-shops, expanding services for its growing user base. DPD has achieved next-day deliveries for about 98% of packages so far, which typically reach customers within 24 hours. Beyond home deliveries, DPD offers a network of 30,000 pickup-dropoff (PUDO) lockers throughout Poland, allowing customers to choose their preferred delivery method.
- As of June 2024, three major road contracts are progressing in Poland, worth USD 284.96 million, USD 158.48 million, and USD 106.83 million. The largest contract involves two sections of the S10 expressway in West Pomerania; one is 19.6 km long, connecting Suchan and Recz, and the other is 16 km, linking Piecnik and Walcz. Additionally, a USD 158.48 million contract has been awarded for Section 3 of the S10 expressway, which connects Szczecin to Pila. This design and construction project, awarded to Mirbud, is expected to take just over three years to finish by 2027.

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Rapid growth of transport and storage sector GDP contribution witnessed despite delays in construction of a few projects

- In April 2024, the construction of a highway in Poland faced a year-long delay, impacting the sector's contribution to GDP. This setback came after archaeologists unearthed traces of settlements, some dating back 10,000 years, alongside artifacts from the Bronze and Iron Ages. Poland's General Directorate for National Roads and Motorways (GDDKiA) revealed that these significant discoveries occurred at two sites near the village of Jawiszowice. The findings emerged during the ongoing work on the S1 expressway in the southern Malopolska province.
- In July 2024, Poland's GDDKiA announced an investment of USD 4.74 billion for road development, upgrades, and maintenance throughout the year. Among the recent contracts awarded, GDDKiA has greenlit a 17 km segment of the S17 expressway, valued at USD 192.36 million. Furthermore, a separate package worth USD 140.60 million has been allocated for roadworks in West Pomerania. Upcoming projects include the Rusinov Ring Road and a segment of the S10 Cybowo-Lowicz Walecki Expressway. These undertakings, which encompass the construction of 16 bridges, aim to alleviate local traffic delays and are slated for completion in 2028.

Fluctuating fuel prices with stabilization expected due to discovery of oil field in Poland

- In September 2024, PKN Orlen, Poland's largest refiner and energy firm, unearthed a significant oil field in western Poland. Located in the Lubuskie region, the newly discovered oil field sits adjacent to the existing Rzeczyca field, which boasts reserves of 100,000 metric tons of oil. Collectively, the entire complex is now projected to contain 500,000 metric tons of oil. Once fully developed, the site is set to yield an annual production of 16,500 metric tons of oil. Preliminary tests at the site suggest a strong likelihood of additional oil deposit discoveries. This development is anticipated to curtail Poland's fuel imports in the future.
- The new tariff regarding fuel transmission has recently been under discussion, and Tariff No. 1/2025 will take effect on January 1, 2025. The President of the Energy Regulatory Office approved it on June 3, 2024. This tariff applies to the transmission of gaseous fuels through the Polish section of the Yamal-Europe Transit Gas Pipeline. The tariff rates will be valid from January 1, 2025, at 6:00 a.m. until January 1, 2026, at 6:00 a.m. It aims to stabilize fuel prices in Poland.

Poland Freight and Logistics Industry Overview

The Poland Freight and Logistics Market is fragmented, with the major five players in this market being CMA CGM Group (including CEVA Logistics), DHL Group, Girtoka, PKP CARGO SA and Raben Group (sorted alphabetically).

Additional Benefits:

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

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