

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

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Report description:

The Spain Road Freight Transport Market size is estimated at 36.66 billion USD in 2025, and is expected to reach 42.92 billion USD by 2030, growing at a CAGR of 3.20% during the forecast period (2025-2030).

The e-commerce industry is projected to expand at a CAGR of 10% from 2023-2027, driving the market's growth

- The manufacturing sector in Spain is one of the major contributors to the country's economy and generates demand for freight operators. Spain is known for its export-oriented industries, such as automotive, machinery, and textiles. These industries rely heavily on road freight services to transport their goods to domestic and international markets. In July 2024, Spain's manufacturing production grew by 4.4%, driven by increases in non-durable consumer goods (8.3%), intermediate goods (6.6%), and durable consumer goods (2.8%). This marks a recovery after a 4.3% decline in June.
- The e-commerce industry is projected to register a CAGR of 10% during the period 2023-2027 and reach USD 47.63 billion by 2027. The rise in e-commerce is expected to drive the growth of the wholesale and retail trade end-user segment. Moreover, rising oil and gas consumption in Spain is expected to support the oil and gas, mining, and quarrying end-user segment. In terms of consumption, oil remains the most widely used fuel in Spain, accounting for 43.8% of the total, followed by natural gas at 21.8%.

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Developing transport and storage sector fueled by growing infrastructure investments by Spanish Government

- In May 2024, plans to build a rail tunnel under the Strait of Gibraltar to connect Spain and Morocco were revived. The Spanish government hired state-owned engineering firm Ineco to update the feasibility study and cost estimates for the project. Initial estimates suggest the tunnel could cost between USD 5.33 billion and USD 10.67 billion, with funding expected from European and African lending institutions. The shortest route between Spain and Morocco is 14 km, but the sea is about 1000 m deep there, making construction difficult. Alternatives being considered are around 28 km long but at a more manageable depth of less than 300 meters. The current plan is for a single-bore tunnel, with the option to add a second parallel tunnel in the future. This tunnel would be used by both passenger and freight trains.
- In June 2024, Spain allocated USD 2.47 billion to enhance rail infrastructure in northern Spain, part of a broader USD 3.09 billion investment in Asturias. Out of this total, USD 2.35 billion is earmarked for EU projects slated for completion by 2030. Meanwhile, developments overseen by Spain's Ministry of Transport, with a budget of USD 744.95 million, are targeted for a 2050 finish. In October 2024, Spain greenlit a tripartite agreement to construct a new southern rail entrance to the Port of Barcelona, with expenses exceeding USD 805.65 million.

Owing to high fuel prices, a discount of USD 0.2 per liter was applied to the retail price as a subsidy by the Spanish government in 2022

- Spain has witnessed a consistent uptrend in fuel prices, with the average cost of a liter of petrol climbing to USD 1.78 by April 2024, marking a 0.96% increase for three consecutive months, reminiscent of mid-October levels. Diesel prices, on the other hand, stood at USD 1.66 per liter, reflecting an uptick of nearly 0.6% in the fourth week of the month. Moreover, gasoline prices have surged by 9.25% since the start of 2024, while diesel has seen a more modest increase of close to 4.5%.
- Fuel prices have been a major concern recently, along with food costs, significantly impacting Spaniards' budgets. By the end of 2024, the price of a liter of 95-octane gasoline is expected to be around USD 1.49, and diesel around USD 1.38. The main reason for this expected drop in fuel prices is the oil market, which is seeing a decline in both supply and demand. The International Energy Agency predicts that oil consumption will fall sharply, from 2.8 million barrels per day in the third quarter of 2023 to 1.1 million in 2024.

Spain Road Freight Transport Industry Overview

The Spain Road Freight Transport Market is fragmented, with the major five players in this market being DACHSER, DHL Group, Grupo Sese, Primafrio and XPO, Inc. (sorted alphabetically).

Additional Benefits:

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

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