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

Market Report | 2025-08-01 | 150 pages | Mordor Intelligence

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Report description:

Sweden Freight And Logistics Market Analysis

Sweden's freight and logistics market size is valued at USD 27.46 billion in 2025 and is forecast to expand to USD 33.11 billion by 2030, reflecting a 3.81% CAGR (2025-2030). The upswing stems from sustained infrastructure spending, accelerating electrification of heavy?duty transport, and rapid adoption of warehouse automation. Robust trade links with the rest of Europe anchor demand, while the Port of Gothenburg's capacity hike is drawing additional maritime flows. Air freight transport, although small, is advancing quickly on the back of high-value manufacturing exports and rising cross-border e-commerce parcels. Meanwhile, rail volumes are beginning to climb as carbon pricing tilts cargo away from roads, and a dense parcel locker network is easing last-mile constraints in major cities.

Sweden Freight And Logistics Market Trends and Insights

Government Investments into Green Freight Corridors and Electrified Road Networks

Sweden plans to electrify 2,000 km of high-traffic highways by 2030, including the world's first permanent electric road on the E20 corridor. Dynamic charging will shrink truck battery packs by up to 71%, cutting vehicle weight and cost. Because road freight transport held a 63.41% share of the freight transport segment in 2024, corridor electrification is set to reshape cost structures for long-haul operators and accelerate heavy-duty EV adoption.

Expansion of Gothenburg Port Capacity to Support Export-Oriented Industries

The Arendal 2 terminal, completed in 2024 at a cost of EUR 60 million (USD 66.21 million), adds 144,000 m? of quay and storage, lifting annual box handling well beyond the record 914,000 TEUs set in 2023. Rail track upgrades now enable 240 trains per day, triple the previous limit. The port's deepened fairway broadens the vessel mix and anchors Sweden's freight and logistics market growth by supporting export-led manufacturers.

Capacity Constraints on Key Rail Freight Lines Causing Delays

Rail carries a significantly lower share of national freight, partly because the Nordic Triangle corridor lacks slots for rising cargo flows. The Malmbanan iron ore line suffered multiple derailments in 2023, halting trade for weeks. Although SEK 165 billion (USD 16.35 billion) has been earmarked for rail upgrades through 2033, industry groups argue the outlay falls short of the SEK 280 billion (USD 27.74 billion) needed to clear critical choke points.

Other drivers and restraints analyzed in the detailed report include:

Shift of Cargo from Road to Rail Driven by Carbon Taxation and EU "Fit-for-55" Policies / Growing Adoption of Warehouse Automation and Robotics to Offset Labor Shortages / High Logistics Costs from Long-Haul Distances and Low Back-Haul Utilization in the North /

For complete list of drivers and restraints, kindly check the Table Of Contents.

Segment Analysis

The manufacturing segment accounted for the largest share of around 34.80% in 2024 within the Sweden freight and logistics market. Automotive, machinery, and high-tech producers funnel considerable volumes through Gothenburg and intermodal depots, requiring time-defined, multimodal solutions. The wholesale and retail trade segment is expected to grow the fastest at 4.08% forecast CAGR (2025-2030), signalling that online retail's parcel surges will steadily close the gap. Construction leans on bulk transport for cement, steel, and project cargo tied to the green-energy build-out. Agriculture, fishing, and forestry, strong pulp exports via Gothenburg kept flows resilient despite global price swings. Mining and energy underpin dedicated rail and port infrastructure in the North.

Growth prospects differ across verticals. Manufacturing continues to retool for electrified mobility and low-CO? metals, spurring demand for inbound battery cells and outbound finished vehicles. Wholesale and retail trade is leveraging parcel lockers and same-day services to sharpen customer propositions. Construction logistics gains from state funding for electrified highways and port expansions. Resource sectors depend on rail reliability; any disruption diverts high-tonnage ore back to road, stressing sustainability goals. Broadly, 8 in 10 Nordic consumers now weigh sustainability in purchasing, pressuring shippers across every vertical to decarbonize distribution.

Freight transport generated 63.45% of total revenues in Sweden freight and logistics market in 2024. Road freight transport remained king, handling short-haul pallets, groupage, and temperature-controlled food distribution. Sea and inland waterways freight transport benefited from direct Asia loops calling Gothenburg. Rail freight transport gained share where green-steel producers signed forward contracts for zero-carbon rail haulage. Air freight transport is small yet strategic for high-value electronics and urgent spares, expected to grow at a CAGR of 4.29% from 2025-2030. The CEP segment captured a significant revenue share of the total revenues on the strength of e-commerce and next-day cross-border offering. Freight forwarding is consolidating as global intermediaries acquire niche Scandinavian brokers to scale digital booking tools. The warehousing and storage segment is the hotbed of automation trials; non-temperature facilities dominate with a 91.76% segment share in 2024.

Margin trends vary. Road carriers face higher capital outlays as they electrify fleets, yet lower fuel and maintenance expenses offset some costs. Maritime lines must factor ETS charges, nudging them toward LNG, methanol, or biodiesel. Air cargo operators embed sustainable aviation fuel surcharges in Scandinavia's largest gateways. Forwarders are merging to fund visibility platforms that can span every mode. Warehouse operators invest heavily in robotics, trading higher capex for labor savings and improved throughput.

The Sweden Freight and Logistics Market Report is Segmented by End User Industry (Agriculture, Fishing, and Forestry, Construction, Manufacturing, Oil and Gas, Mining and Quarrying, Wholesale and Retail Trade, and More) and by Logistics Function (Courier, Express, and Parcel (CEP), Freight Forwarding, Freight Transport, Warehousing and Storage, and Other Services). The Market Forecasts are Provided in Terms of Value (USD).

List of Companies Covered in this Report:

A.P. Moller - Maersk (Including Maersk Sverige AB) / CMA CGM Group (Including CEVA Logistics) / DHL Group / DSV A/S (Including DB Schenker) / Fast Forward Logistics AB / FedEx / GDL AB / GEODIS (Including GEODIS Sweden AB) / Green Cargo / HRX (Including HRX Sverige AB) / Instabee (Including Budbee and Insatbox) / Key Logistics / Kuehne+Nagel / LGT Logistics AB / MaserFrakt AB / Nordic Transport Group A/S / Posten Bring AS / PostNord (Including PostNord Sverige AB) / Stena AB / TKL Logistics / United Parcel Service of America, Inc. (UPS)* /

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