

France Freight And Logistics - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2026 - 2031)

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Report description:

France Freight And Logistics Market Analysis

The France freight and logistics market is expected to grow from USD 164.78 billion in 2025 to USD 170.45 billion in 2026 and is forecast to reach USD 201.86 billion by 2031 at 3.44% CAGR over 2026-2031. Sustained infrastructure upgrades, fast-rising e-commerce parcel flows, and full rollout of paperless customs procedures collectively reinforce the growth trajectory. The government's EUR 2 billion (USD 2.2 billion) Fonds vert program accelerates decarbonization projects across all modes, offering direct grants and tax credits that lower the cost of new green assets. Consolidation moves-most notably CMA CGM's EUR 5.2 billion (USD 5.7 billion) purchase of Bollore Logistics-create vertically integrated providers able to sell truly end-to-end services. Digital fleet telematics, hydrogen handling equipment, and AI-enabled risk engines raise asset utilization while shrinking emissions footprints, underpinning competitive advantage as Fit-for-55 obligations tighten.

France Freight And Logistics Market Trends and Insights

Digitalization of Customs Procedures

Full deployment of electronic declarations under the Union Customs Code has cut clearance times for compliant cargo by up to 30%, benefiting high-value automotive and aerospace supply chains. AI-driven risk engines enable selective inspections, freeing scarce border officers for complex checks and reducing truck dwell times at Calais and Le Havre. Freight forwarders report smoother document workflows and lower brokerage fees, enhancing the overall competitiveness of the France freight and

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logistics market.

Surge in E-commerce Parcel Volumes

Domestic parcel flows grew more than 20% year-on-year in 2024 as consumers demanded tighter delivery windows; operators like Chronopost opened urban micro-hubs and expanded cargo-bike fleets to comply with low-emission zones. Automated sortation and AI route optimization improve stop density, keeping cost per parcel in check even as network complexity rises.

Driver Shortage and Ageing Workforce

An estimated 60% of driving posts could remain vacant by 2026 as retirements outpace new entrants; licensing costs exceed EUR 3,000 (USD 3,310), discouraging younger applicants. Wage inflation erodes margins, forcing small fleets to subcontract or exit, reshaping the competitive fabric of the France freight and logistics industry.

Other drivers and restraints analyzed in the detailed report include:

Green Tax Incentives for Intermodal Shift
Near-Shoring of EU Supply Chains
CAPEX Burden of Fit-for-55 Compliance

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

Segment Analysis

Manufacturing held 31.21% of the France freight and logistics market share in 2025 as automotive, aerospace, and pharmaceuticals depended on high-precision just-in-time deliveries. Inbound sequencing and vendor-managed inventory keep warehouse dwell times low, favoring providers with sophisticated IT interfaces. Wholesale and retail trade rises the fastest at 3.62% CAGR (2026-2031), with omnichannel models favoring micro-fulfillment locations near dense populations.

Defense re-armament spending sustains demand for classified storage and escorted convoys, while agri-food volumes stay resilient on food-security priorities. Energy-transition policies reduce fossil-fuel traffic, reshaping lane profitability within the France freight and logistics market.

Freight transport delivered 59.58% of the France freight and logistics market size in 2025, supported by integrated road-rail-sea networks that cater to heavy industrial flows and cross-border trade. IoT-enabled fleet platforms cut empty-running and boost asset turns, preserving margins as diesel prices rise. CEP, though smaller, is the fastest-growing slice, with a 3.88% CAGR between 2026-2031, reflecting same-day delivery expectations in major cities. Inventory repositioning closer to consumers fuels warehousing demand, while freight forwarding retains relevance for customs and multimodal coordination.

Customer pressure for end-to-end visibility compels providers to bundle transport, storage, and returns services into single contracts. Players that master data analytics and eco-optimized routing gain share in the fiercely contested France freight and logistics market.

The France 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 Others) 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:

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Balguer Group CLASQUIN CMA CGM Group (Including CEVA Logistics) DACHSER DHL Group Dimotrans Group DSV A/S (Including DB Schenker) FedEx FM Logistic GEODIS Groupe CAT Kuehne+Nagel La Poste Group Rhenus Group Savino Del Bene SpA SEKO Logistics STEF Group United Parcel Service of America, Inc. (UPS) XPO, Inc. Ziegler Group

Additional Benefits:

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

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