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

Market Report | 2026-01-16 | 348 pages | Mordor Intelligence

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Report description:

Netherlands Freight And Logistics Market Analysis

The Netherlands freight and logistics market is expected to grow from USD 53.62 billion in 2025 to USD 55.86 billion in 2026 and is forecast to reach USD 68.52 billion by 2031 at 4.18% CAGR over 2026-2031. The outlook benefits from the country's role as Europe's primary gateway, supported by Rotterdam's 15.3 million TEU container capacity and Schiphol's pharmaceutical specialization, which anchors multimodal connectivity across road, rail, barge, and air corridors. Inland waterways move 35% of freight tonnage, enabling cost-efficient hinterland reach, while road transport keeps operational primacy for last-mile networks despite labor scarcity and congestion. Cross-border e-commerce parcels from Asian webshops have lifted courier, express, and parcel (CEP) volumes, sparking a 34.4% jump in international parcel flows in Q3 2024 and prompting network automation investments by incumbents such as PostNL. Industry consolidation continues, evidenced by DSV's USD 15.3 billion acquisition of DB Schenker in April 2025, which accelerates scale advantages in freight forwarding and contract logistics. Government incentives for a modal shift to rail and barge, combined with rising demand for temperature-controlled warehousing, open opportunities for integrated service providers able to blend sustainability compliance with high-service reliability.

Netherlands Freight And Logistics Market Trends and Insights

Booming E-commerce Parcel Volumes

International parcels surged 34.4% in Q3 2024, dwarfing domestic growth of 1.0% year-to-date and straining sortation assets.

PostNL responded by installing 1,070 automated lockers, cutting last-mile costs 15-20% per parcel while enhancing out-of-home delivery convenience. Volume density in Randstad hubs supports hub-and-spoke models, yet rural routes remain cost-challenged. Traditional retailers emulate pure-play platforms: Albert Heijn's Buurt Bezorgbundel program pools neighborhood orders to reduce van-kilometers and delivery windows. Implementation of the DMS 4.0 customs system raises data-traceability demands and administrative workloads but ultimately boosts supply-chain transparency.

Expansion of Rotterdam Port Capacity and Hinterland Connectivity

A EUR 1 billion (USD 1.10 billion) Maasvlakte II expansion lifts annual container throughput to 15.3 million TEU by 2027, while APM Terminals' automation cuts dwell time 18%. Rail upgrades on the Betuwe Route, co-funded through the EU Clean Industrial Deal, fortify German hinterland access that already accounts for 40% of Rotterdam volumes. MSC's investment in the Barge Center Waalhaven strengthens barge resilience against road congestion. Hydrogen-economy projects, spearheaded by Shell's 200 MW electrolyzer, position the port as a green-fuel hub and create fresh logistics flows for hydrogen transport and storage.

Driver Shortage and Ageing Workforce

A global shortfall of 3.6 million truck drivers raises Dutch wage costs 3.6-5.1% a year, with 40% of domestic drivers already over 50 years old. PostNL outsources up to 30% of routes to subcontractors, targeting 50% by 2026 to safeguard coverage. Automation offsets some labor gaps Vanderlande's cloud-based sortation controls elevate throughput without extra headcount. Still, capital-investment needs and regulatory hurdles for digital tachographs deter new entrants, prolonging labor tightness.

Other drivers and restraints analyzed in the detailed report include:

Government Push for Modal Shift to Rail and Inland WaterwaysGrowth of Pharma Cold-Chain Exports via Schiphol CEIVHigh Road Congestion and Urban Access Restrictions

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

Segment Analysis

Manufacturing retained 32.38% of Netherlands freight and logistics market share in 2025, driven by chemicals, food processing, and semiconductor equipment clusters. Retail and wholesale, while smaller, will chart a 4.4% CAGR (2026-2031) as cross-border e-commerce pushes inventory closer to consumers. Agriculture benefits from efficient cold-chain exports, while construction logistics adapts to dense urban sites requiring smaller, more frequent deliveries. Oil and gas logistics contract, offset by rising renewables freight such as wind-turbine blades.

Albert Heijn's route-consolidation pilot trims empty kilometers and signals grocery retailers' adoption of logistics tech. FedEx's Veldhoven hub underscores pharmaceutical logistics growth, commanding premium cold-chain rates. Manufacturing plants increase near-shoring buffers, lifting demand for just-in-time services that agile providers can monetize.

Freight transport accounted for 62.18% of the Netherlands freight and logistics market share in 2025, anchored by bulk flows through Rotterdam and Schiphol. Courier, express, and parcel (CEP) services, however, are projected to clock the highest 4.68% CAGR (2026-2031), reflecting the rise of time-sensitive e-commerce shipments. The Netherlands freight and logistics market size tied to warehousing and storage grows in tandem with automation; Vanderlande's FASTPICK system cut picking errors by 40% in De Bondt's center. Value-added services such as customs brokerage gain traction as EU regulatory complexity escalates.

Integration of freight transport with CEP is visible in Bleckmann's omnichannel fulfillment tie-up with Netlog, blending traditional forwarding with last-mile delivery. Investment in digital customs platforms further distinguishes full-service providers from single-function specialists as DMS 4.0 compliance becomes mandatory.

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

List of Companies Covered in this Report:

A.P. Moller - Maersk Bleckmann Logistics Broekman Logistics C.H. Robinson CMA CGM Group (Including CEVA Logistics) DFDS Logistics DHL Group DSV A/S (Including DB Schenker) Ewals Cargo Care FedEx International Distribution Services (IDS) (Including GLS Group) Jan de Rijk Logistics Kuehne+Nagel Lineage, Inc. Neele-Vat Logistics PostNL United Parcel Service of America, Inc. (UPS) Vos Logistics Wolter Koops XPO, Inc.

Additional Benefits:

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

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