

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

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Report description:

Central And Eastern Europe Freight And Logistics Market Analysis

The Central and Eastern Europe freight and logistics market is expected to grow from USD 159.09 billion in 2025 to USD 163.63 billion in 2026 and is forecast to reach USD 188.27 billion by 2031 at 2.85% CAGR over 2026-2031. Nearshoring by German OEMs, accelerated TEN-T corridor upgrades, and the region's digital transformation are reinforcing sustained demand across all major logistics functions. Poland's hub status along the China-Europe rail corridor, rising 5G deployments in core logistics parks, and EU Green Deal incentives for rail and waterways further differentiate the Central and Eastern Europe freight and logistics market from Western European peers. Consolidation activity, such as DSV's purchase of DB Schenker, is elevating scale-driven efficiencies, while technology-enabled forwarders inject competitive dynamism. Key risks include a widening professional driver deficit, intermittent border congestion at EU external frontiers, and lagging cold-chain capacity that could temper growth momentum.

Central And Eastern Europe Freight And Logistics Market Trends and Insights

European Union TEN-T Corridor Upgrades Enabling Intermodal Efficiencies

The latest Trans-European transport network (TEN-T) financing round earmarked EUR 2.5 billion (USD 2.75 billion) for CEE projects in 2024, accelerating European rail traffic management system (ERTMS) deployment and cutting cross-border rail dwell times by up to 30%. Operators on the Warsaw-Berlin and Budapest-Vienna routes report 15-20% efficiency gains, underpinning new rail-road service offerings that deepen the Central and Eastern Europe freight and logistics market's multimodal capabilities.

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Improved connectivity allows Polish terminals to funnel higher China-Europe rail volumes into adjacent Czech and Slovak hubs, creating network effects that sustain rate stability during seasonal peaks. Revised Combined Transport Directive targets further incentivize shippers to shift medium-distance traffic from road to rail, fostering long-run carbon and cost savings.

German Auto Supply Chains Shift Closer to Home with Poland and Slovakia in Focus

Hyundai, Vitesco Technologies, and Chassis have collectively slated more than EUR 576 million (USD 635.69 million) toward new CEE plants, reinforcing the local production ecosystem for battery systems and powertrains. Hungary alone secured USD 18.8 billion in electromobility FDI, positioning the country among Europe's battery capitals. Relocated tier-1 suppliers require bonded, temperature-controlled freight and specialized warehousing, with lifting demand elasticity across road, rail, and air modes within the Central and Eastern Europe freight and logistics market. Slovakia's favorable tax framework and Poland's established automotive clusters cultivate dense distribution lanes that benefit freight forwarders specializing in time-critical deliveries to German assembly plants.

Chronic Driver Shortage Noticed in CEE Road Haulage

EU-wide driver gaps topped 233,000 positions in 2024, with Czech transport associations citing 25,000 vacancies locally. The average driver age now exceeds 50, and stricter rest-time mandates under the EU Mobility Package squeeze fleet productivity. Wage inflation of 15-20% annually elevates road freight tariffs, potentially nudging shippers toward rail and intermodal options. Several Polish carriers have introduced advanced driver assistance Systems (ADAS) and autonomous trials on controlled corridors, though full commercial roll-out remains years away. Persistent shortages weigh on the Central and Eastern Europe freight and logistics market's capacity ceiling and service reliability.

Other drivers and restraints analyzed in the detailed report include:

China-Europe Rail Freight Growth Witnessed via New Silk Road
European Union Green Deal Modal Shift Funding to Rail and Waterways
Border Congestion Witnessed at EU External Frontiers

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

Segment Analysis

Wholesale and retail trade dominated with a 30.12% share in 2025 and is projected to grow at a 3.08% CAGR (2026-2031) as e-commerce gross merchandise value (GMV) hits USD 42.9 billion in 2024. Big-box and grocery chains are overhauling distribution centers to meet same-day delivery benchmarks, injecting automation spending into the Central and Eastern Europe freight and logistics market.

Manufacturing is growing significantly, largely on the back of auto and electronics clusters. Battery gigafactories in Poland and Hungary drive specialized inbound flows, including lithium-ion cells that demand ADR-compliant, temperature-controlled transport, boosting premium yields for operators.

Freight transport captured 64.72% of 2025 revenue, underscoring its foundational role in meeting manufacturing and distribution needs across the Central and Eastern Europe Freight and Logistics market. Road, rail, and intermodal carriers benefit from robust cross-border trade, particularly along Poland-Germany lanes. The Central and Eastern Europe freight and logistics market size is projected to grow, supported by automotive nearshoring and Eurasian rail flows. CEP, although smaller, is rising fastest; automation in parcel hubs and expansion of pick-up point networks shorten delivery cycles and fuel a 3.32% CAGR (2026-2031). Digital platforms enable real-time price discovery and capacity matching, allowing forwarders to integrate Freight Transport and

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CEP services under unified dashboards. The interplay of these services underpins flexible, end-to-end solutions that attract multinational shippers seeking resilience.

Historical resilience is evident: sovereignty-related challenges and pandemic shocks slowed activity in 2020, yet e-commerce growth spurred the CEP segment's share in 2024. Warehousing and storage posted stable, mid-single-digit growth as omnichannel retailers demanded higher inventory buffers. Freight Forwarding added value through trade route diversification, with digital brokers exploiting API connectivity to airlines and rail operators, an emerging differentiator in the Central and Eastern Europe freight and logistics industry.

The Central and Eastern Europe Freight and Logistics Market Report is Segmented by End User Industry (Construction, Manufacturing, Wholesale and Retail Trade, and More), by Logistics Function (Courier, Express, and Parcel (CEP), Freight Forwarding, Freight Transport, Warehousing and Storage, and More) and by Geography (Albania, Bulgaria, Croatia, Czech Republic, and More). The Market Forecasts are Provided in Terms of Value (USD).

List of Companies Covered in this Report:

Cargus CMA CGM Group (Including CEVA Logistics) DACHSER DHL Group DSV A/S (Including DB Schenker) Expeditors International FedEx Gebrüder Weiss GEODIS Hamburger Hafen und Logistik AG (Including METRANS) Kuehne+Nagel La Poste Group (Including GeoPost) Magyar Posta Zrt NYK (Nippon Yusen Kaisha) Line OBB-Holding AG (Including Rail Cargo Group) PKP CARGO SA Raben Group Rhenus Group ROHLIG SUUS Logistics SA United Parcel Service of America, Inc. (UPS) Waberner's International Nyrt. Walter Group

Additional Benefits:

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

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