

A&A Releases New Report: “Cape of Good Hope: Global International Transportation Management (ITM) Market Analysis”

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Armstrong & Associates, Inc. (A&A), an internationally recognized leader in Third-Party Logistics (3PL) market research, consulting, and M&A advisory services, today released “Cape of Good Hope: Global International Transportation Management (ITM) Market Analysis,” a comprehensive analysis of the global ITM 3PL segment heading into 2026 and 2027.

The report tracks the global ITM market through one of the most volatile cycles in modern freight forwarding history — a surge from \$274 billion in 2019 to a peak of \$533 billion in 2022, followed by a 46.5% collapse to \$285 billion in 2023, and a recovery to \$329.0 billion in 2025, up 8.0% year over year. A&A projects continued growth of 5.5% to \$347.1 billion in 2026 and 4.2% to \$361.6 billion in 2027.

The 2026 Recovery, Reshaped by an Unusual Set of Forces

The ITM market’s recovery is being shaped by a confluence of geopolitical, regulatory, and supply-side dynamics not seen in prior cycles:

- **Tariff policy disruption:** The U.S. Supreme Court’s decision striking down the IEEPA-based tariff regime, replaced by a 10% Section 122 global tariff, and the elimination of the de minimis exemption for China-origin imports;
- **Middle East conflict and the Cape of Good Hope reroute:** Asia–Europe and Asia–U.S. East Coast ocean traffic redirected around southern Africa, extending transits 10–14 days, with approximately 8–10% of global container capacity temporarily sidelined in or near the Persian Gulf;

A&A’s Top 25 Global Freight Forwarders – 2026

Ranked by combined score across 2025 gross logistics revenue, ocean TEUs, and air metric tons.

Rank	Provider	HQ	Gross Rev (\$M)	Ocean TEUs	Air Met Tons
1	Kuehne + Nagel	Switzerland	\$33,836	4,325,000	2,030,280
1	DSV	Denmark	\$37,379	3,695,424	2,013,127
2	DHL Supply Chain & Global Forwarding	Germany	\$35,538	3,274,000	1,767,000
3	Sinotrans	China	\$13,580	4,925,154	912,000
4	NIPPON EXPRESS	Japan	\$17,199	1,806,197	933,201
5	CEVA Logistics	France	\$18,300	1,730,000	680,000
6	Expeditors	United States	\$11,069	855,200	928,000
7	C.H. Robinson	United States	\$14,768	1,256,000	280,000
7	KLN	Hong Kong, SAR	\$7,471	1,149,956	840,508
8	GEODIS	France	\$11,700	962,000	267,056
9	Cosco Shipping Logistics	China	\$8,989	1,961,791	207,656
10	Maersk Logistics	Denmark	\$15,103	635,000	318,000
11	Hellmann Worldwide Logistics	Germany	\$3,952	955,000	595,000
12	Kintetsu World Express	Japan	\$5,018	738,003	546,095
13	UPS Supply Chain Solutions	United States	\$8,771	530,000	790,000
14	Yusen Logistics	Japan	\$5,157	632,000	280,320
15	LX Pantos	South Korea	\$5,624	1,633,000	126,000
16	DACHSER	Germany	\$9,349	544,196	238,613
17	CTS International Logistics	China	\$2,401	842,700	331,900
18	AWOT Group	China	\$3,350	402,000	785,000
19	CIMC Wetrans Logistics	China	\$3,808	961,197	114,000
19	Scan Global Logistics	Denmark	\$2,851	691,000	212,000
20	Rhenus Logistics	Germany	\$8,869	567,089	110,595
21	Logwin	Luxembourg	\$1,530	685,000	188,000
21	Savino Del Bene	Italy	\$3,500	852,000	93,000

- Importer frontloading and inventory volatility ahead of expected further tariff changes;
- Structural reshaping of the Top 25 global freight forwarders following the DSV-DB Schenker combination and CMA CGM/CEVA's integration of Bolloré Logistics.

Summary of Key Findings in the Report

- North America has been the structural winner from the 2017–2025 cycle;
- Asia Pacific remains the largest regional ITM market at \$122.0 billion in 2025 (37.1% global share);
- Europe's ITM share has eroded from 19.1% in 2017 to 17.1% in 2025;
- The Top 5 global freight forwarders — Kuehne + Nagel, DSV, DHL Supply Chain & Global Forwarding, Sinotrans, and NIPPON EXPRESS — together generate approximately \$137.5 billion in gross logistics revenue and handle approximately 9–10% of global containerized ocean freight movements and 11–12% of global air cargo;
- Buy-side global 3PL M&A remained intense through 2025 with 23 transactions over \$100 million (six over \$1 billion).

“Cape of Good Hope: Global International Transportation Management (ITM) Market Analysis” is available for purchase at www.3plogistics.com. The report's contents and a sample of the report is available at [Cape of Good Hope: Global ITM Market Analysis - 2026](#). The report is also included as a standard download in all four tiers of A&A's [Expert Information Service \(EIS\) subscription](#).

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