Global Freight Forwarding Market Reaches €208bn in 2025 Amid Structural Shift to Steady Growth

Ti Insight projects the global freight forwarding market will reach €233bn by 2030 as forwarders pivot from technology, sustainability & value-added services.

Global Freight Forwarding

LONDON, UNITED KINGDOM, June 11, 2026 /EINPresswire.com/ -- The global freight forwarding market reached a value of €208.1 billion in 2025, expanding 4.4% in real terms, according to new data published today by Transport Intelligence (Ti). The figure marks a significant cooling from the post-pandemic rebound of 2024 and signals a market entering a period of structurally constrained but steady growth through 2030.

Market Overview: From Volatility to Measured Expansion:

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> *Ti Insight*

Sea freight forwarding led growth in 2025 with a 4.6% expansion, driven by rising international trade volumes, multimodal demand and surging e-commerce. Air freight forwarding grew 4.1%, supported by sea-to-air conversions, Red Sea disruptions and accelerated pre-loading ahead of anticipated US tariffs. Asia-Pacific exports were the dominant growth driver across both modes.

Growth is forecast to slow to 2.5% in 2026, reaching €213.4 billion, as geopolitical turbulence, including a Middle East conflict that erupted in late February 2026, cut global air cargo capacity by 22% and reduced Asia–Europe routes through the region by 39%. The IMF projects global real GDP growth of 3.1% in 2026, while the WTO forecasts merchandise trade volume growth of just 1.9%.

2030 Outlook: Technology and Specialisation Drive Competitive Advantage:

The global freight forwarding market is projected to reach €233.0 billion by 2030, growing at a 2.3% CAGR over the five-year period. Sea freight forwarding is expected to outpace air, growing at 2.9% CAGR versus 1.6% for air, as investments in digital forwarding platforms, carbon-efficient routing and cross-border e-commerce logistics accelerate.

'The easy revenue of inflated freight rates is gone,' the report states. 'Growth now comes from operational efficiency, technology adoption, customer retention, and strategic positioning.' Forwarders are increasingly differentiating through value-added services, sustainability credentials and integrated digital platforms rather than pure freight arbitrage.

Key Forces Reshaping the Market:

Ti’s analysis identifies several structural forces reshaping competitive dynamics:

- Consolidation: The transformative DSV-Schenker merger is accelerating industry consolidation and margin pressure across the sector.

- Supply chain reconfiguration: Manufacturing capacity continues shifting from China to emerging hubs in Vietnam, India, Indonesia and Mexico, creating new trade lane dynamics.

- Geopolitical disruption: The Red Sea crisis, US–China tariff tensions and Middle East conflict are persistently reshaping global trade flows and forcing forwarders to invest in network resilience.

- Emerging demand pockets: Air freight is finding selective growth in pharmaceutical cold-chain logistics and AI infrastructure airfreight demand from hyperscaler developers, partially offsetting structural capacity constraints.

Industry Voices:

Kuehne+Nagel CEO Stefan Paul noted that Sea Logistics in Q1 2026 was “affected short-term by disruptions in the Middle East,” generating CHF 1.9bn in turnover with “increased service intensity during the quarter.”

DHL Global Forwarding Asia Pacific CEO Niki Frank commented: “2026 is expected to be a year of very different realities for shippers depending on mode, geography and routing. Shippers that embrace agility, operational and environmental, will weather the storm.

About Transport Intelligence (Ti Insight):

Transport Intelligence (Ti Insight) is a leading provider of research, analysis and data for the global logistics industry. Ti’s research covers freight forwarding, contract logistics, express delivery and road freight, serving leading logistics companies, shippers and investors worldwide.

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