

United States Freight and Logistics Market - Growth, Trends, Covid-19 Impact, and Forecasts (2023 - 2028)

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Report description:

The United States Freight and logistics market is expected to record a CAGR of 4% during the forecast period of 2022-2027.

COVID-19 has severely impacted the United States Freight and Logistics market. The United States airlines saw demand decrease by 1.8% in November 2021, compared to the same period a year earlier when capacity increased by 4.1%. Cargo traffic on the Asia-United States trade lanes decreased by 2.4% year on year as a result of factory closures in Asia due to COVID-19.

The Freight and logistics industry in the United States is a highly integrated supply chain network that links producers and consumers through multiple transportation modes, including air and express delivery services, freight rail, maritime, and truck transport.

The export value of the United States air freight flows in 2020 amounted to almost USD 26.1 billion, while the volume of rail freight transported within the country amounted to just over 2.1 trillion tonne-kilometers. The United States ton-miles of freight are expected to reach 7.67 trillion ton-miles by 2045. The ports in the United States in the first half of 2021 experienced growing container volumes, while rail cargo experienced a slow down due to intense competition from trucking. It was a mixed year for the United States freight and logistics industry.

Owing to rising environmental concerns, green logistics solutions have been adopted in recent years. At present, the United States represents one of the key markets for logistics in the region with a highly integrated supply chain network that links producers and consumers through multiple transportation modes, such as air and express delivery services, freight rail, maritime transport, and truck transport.

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US Freight & Logistics Market Trends

The Rail Freight Segment is Observing Steady Growth

In the United States, rail freight traffic, measured in revenue per ton-mile, increased by 6.8% from 2021 and 6% compared to 2017-2021. On a year-on-year basis, the rail freight sector's workload, measured in gross ton-mile, increased by 10.15% compared with the five-year average. The distance traveled by the United States freight trains, measured in freight train miles, increased by 5.4% to USD 68.6 million in 2021 as compared to 2020. In 2020, the total intermodal traffic that originated in the United States increased by 1.85% from 2019, as the United States Class 1 railways transported more trailers and containers.

Additionally, in 2020, the number of carloads from the country increased by 15.85% to a new record-high value of USD 6.1 million, and the growth was led by manufacturing and miscellaneous shipments and intermodal freight.

The Rail Association of the United States tracked 11 commodity groupings moved by freight railway in the country. In 2021, intermodal goods, minerals, fuels, and chemicals were the largest groupings of carloads transported via the US railways, accounting for 6.7% of all carloads.

The country's trade with Canada and Mexico reached a yearly high through the later stages of the third and early parts of the fourth quarter of 2021. Exports to Canada reached USD 25.3 billion in December 2021, while imports were highest in September 2021 at USD 26.9 billion. According to the United States Census Bureau data, trade exports to Mexico reached the highest of USD 22.3 billion in October 2021, while imports from south of the border registered the highest total in August 2021, at USD 31 billion.

Ecommerce Sales Driving Last Mile and Courier Express and Parcel Growth

The e-commerce penetration in the United States is increasing, signifying a good occupancy of the e-commerce share in the total retail industry. The growth of e-commerce is expected to drive the last mile, and the courier expresses parcel segments of the logistics sector.

E-commerce represented a growing share of the retail market in 2021, taking an 18.3% share of total retail sales last year, up from 16.9% in 2020 and 11.6% in 2018. E-commerce sales represented more than half (51.9%) of all retail sales growth in the United States. This is the largest share of growth for purchases made online since 2014, when e-commerce accounted for 63.8% of all sales growth.

According to the National Retail Foundation, the United States consumers spent approximately USD 686 billion on e-commerce in 2021, representing an increase of 14% as compared to the year 2018.

US Freight & Logistics Market Competitor Analysis

The competitive landscape of the United States freight and logistics market is observed to be fragmented with the presence of major international and domestic players in the country. The United States freight and logistics market observes high competition from the players. The technological development in the market has made it easier for new players to enter the market. Besides transportation and distribution services, numerous players offer specialized services such as reverse logistics, IT services, and consulting. Some of the major players are XPO Logistics, UPS Supply Chain Analysis, DHL Supply Chain, Penske Logistics, and J.B Hunt Transport Services.

Additional Benefits:

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

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