

Canada Customs Brokerage - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)

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Report description:

The Canada Customs Brokerage Market size is estimated at USD 759.42 billion in 2025, and is expected to reach USD 964.40 billion by 2030, at a CAGR of greater than 4.05% during the forecast period (2025-2030).

Key Highlights

- The Canadian customs brokerage market is pivotal in facilitating international trade, ensuring goods crossing borders adhere to pertinent regulations and laws. Customs brokers, licensed by the Canada Border Services Agency (CBSA), oversee the import and export of goods, assisting with classification, valuation, and regulatory compliance.
- The Canadian Society of Customs Brokers (CSCB) is a linchpin in Canada's trade and transportation arena. Each year, CSCB brokers oversee over 90% of import transactions for 227,000 importers nationwide, guaranteeing accurate duty and tax submissions on goods valued in the billions. The CSCB emphasizes partnering with governmental and private sectors to devise innovative solutions for the dynamic challenges of global trade.
- The CBSA introduced its CBSA Assessment and Revenue Management (CARM) digital initiative, aiming to transform duty and tax collections on imports. CARM, launched internally on May 13, 2024, was designed to enhance the Agency's compliance and enforcement. However, due to a strike vote by the Public Service Alliance of Canada, the CBSA has deferred the launch for trade partners to October 2024. This postponement allows the Agency to better assist partners in adapting to CARM, meaning trade partners will continue their current operations until the fall.
- In November 2023, Kuehne+Nagel, aiming for its Roadmap 2026 growth objectives, announced its acquisition of Farrow, a prominent Canadian customs broker. This strategic acquisition not only broadens Kuehne+Nagel's service offerings for businesses leaning on customs clearances but also positions the firm to address the surging demand amid shifting international trade regulations. Farrow, with a legacy spanning 112 years and headquartered in Windsor, Ontario, employs 830 professionals across 41 locations in Canada and the USA. Notably, in 2022, Farrow managed over 1.5 million customs entries.

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- The Farrow acquisition is set to enhance Kuehne+Nagel's earnings immediately, especially fortifying its customs operations at the Canadian and Mexican borders in the USA. With Farrow, Kuehne+Nagel gains not just a premier customs brokerage and logistics entity, but also a rich legacy, a progressive vision, and significant scalability potential.

Canada Customs Brokerage Market Trends

The Trend Of Nearshoring Is Driving Market Growth

- In recent years, the trade link between Mexico and Canada has seen remarkable growth, primarily fueled by the automotive and advanced manufacturing sectors. This surge in economic collaboration has been driven by a strategy known as nearshoring, which bolsters bilateral ties and reshapes the trade and investment landscape.
- Beyond trade, this allure has translated into substantial direct investments. While Canada was the sixth-largest investor in Mexico in Q3 2023, it has historically been a key player in Mexico's FDI landscape.
- Canada's cumulative investments in Mexico stand at USD 50.83 billion, securing it the third spot in historical FDI, trailing only the US and Spain. As nearshoring gains momentum, both Mexico and Canada are ramping up their manufacturing and shipping activities to the US, pivoting from China amid trade uncertainties.
- Businesses are increasingly adopting a "plus one" strategy, maintaining ties with the US while diversifying their sourcing, further fueling the nearshoring trend. This shift, which involves moving operations to nearby countries for cost-efficiency and proximity, is notably spiking the demand for customs brokerage services in Canada.
- Typically, this entails relocating manufacturing or sourcing to nations like Mexico or Central America, fostering heightened trade and, consequently, a surge in customs clearances.

Increasing Cross-Border Road Freight Driving the Market

- Cross-border land transport between the United States and its North American partners, Canada and Mexico, is on the rise. This upward trend is set to continue, largely driven by the USMCA (United States-Mexico-Canada Agreement).
- In a notable development, Mexico surpassed both Canada and China to become the United States' largest trading partner in 2023. The trade value between the U.S. and Mexico reached an impressive USD 798 billion (CAD 1.1 trillion), outpacing transactions with other key partners.
- Canada and the United States share the world's most extensive trading relationship, a partnership that supports millions of jobs in both countries. In 2023, as primary trade partners, they exchanged nearly USD 3.6 billion in goods and services daily.
- Industry insiders highlight key commodities in the US-Canada trade basket, including commercial vehicles, passenger cars, auto parts, and a significant volume of oil, gasoline, and other fuels.
- The expanding US-Canada trade and the burgeoning American market are fueling a rise in transportation acquisitions and service expansions along the northern border.
- Roadrunner, a leading U.S. less-than-truckload (LTL) carrier, plans to launch cross-border services into Canada by December 2023, as reported by the Journal of Commerce.
- Canada Cartage's acquisition of Montreal-based GTI Group, which owns several U.S. trucking and logistics entities, underscores the trend. In a similar vein, Kuehne+Nagel strategically acquired Farrow, a leading Ontario-based customs brokerage and logistics provider, in November 2023.
- Trucking is central to the US-Canada road freight trade, highlighting the heavy reliance on this transportation mode. Moreover, technological advancements in freight and logistics are set to enhance customs clearance efficiency at land borders.
- In November 2023, a transport and logistics company, in partnership with a cargo associate, launched a new cross-border

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service linking the U.S., Canada, and Mexico. This service, featuring trucking, warehousing, and customs clearance, offers a suite of tailored solutions.

- Dominating the Canadian customs brokerage market are industry heavyweights like United Parcel Services Inc., FedEx Corporation, Deutsche Post DHL Group, Livingston International, Expeditors International, and A.N. Deringer.

Canada Customs Brokerage Industry Overview

The market for Customs Brokerage in Canada is fragmented in nature. With a large number of customs brokers operating in the market, the competition is high. The top players in the market include United Parcel Service, FedEx Corporation, Livingston, A.N Deringer, DHL Group, etc.

Additional Benefits:

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

Table of Contents:

1 INTRODUCTION

1.1 Study Assumptions

1.2 Scope of the Study

2 RESEARCH METHODOLOGY

2.1 Analysis Method

2.2 Research Phases

3 EXECUTIVE SUMMARY

4 MARKET INSIGHTS AND DYNAMICS

4.1 Current Market Scenario

4.2 Market Dynamics

4.2.1 Drivers

4.2.1.1 Increasing M&a Activities In The Customs Industry Are Strengthening The Market-studied

4.2.1.2 Increasing M&a Activities In The Customs Industry Are Strengthening The Market-studied

4.2.1.3 Continuously Updating Custom Requirements Are Driving Demand For Expert Customs Brokerage Services In Canada

4.2.2 Restraints

4.2.2.1 High Costs

4.2.2.2 Employees Strike

4.2.3 Opportunities

4.2.3.1 Demand For Customized Services

4.2.3.2 Customs Brokerage Firms Pivoting Toward Sustainability Amid Rising Environmental Concerns

4.3 Value Chain / Supply Chain Analysis

4.4 Industry Attractiveness - Porter's Five Forces Analysis

4.4.1 Threat of New Entrants

4.4.2 Bargaining Power of Buyers/Consumers

4.4.3 Bargaining Power of Suppliers

4.4.4 Threat of Substitute Products

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- 4.4.5 Intensity of Competitive Rivalry
- 4.5 Government Initiatives and Regulations
- 4.6 Insights on Imports and Custom Brokerage Services
- 4.7 Brief on Customs Brokerage as a Freight Forwarding Function
- 4.8 Overview of Customs Pricing
- 4.9 Insights on Customs Brokerage Services by End-user Industry
- 4.10 Impact of Geopolitics and Pandemics on the Market

5 MARKET SEGMENTATION

- 5.1 By Mode Of Transport
 - 5.1.1 Sea
 - 5.1.2 Air
 - 5.1.3 Cross-Border Land Transport

6 COMPETITIVE LANDSCAPE

- 6.1 Market Concentration Overview
- 6.2 Company Profiles
 - 6.2.1 DHL Group Logistics
 - 6.2.2 Livingston
 - 6.2.3 United Parcel Services
 - 6.2.4 A.N Deringer
 - 6.2.5 FedEx Corporation
 - 6.2.6 Universal Logistics
 - 6.2.7 Argo Customs
 - 6.2.8 DB Schenker
 - 6.2.9 Kuehne and Nagel
 - 6.2.10 World Wide Customs Brokers Limited*
- 6.3 Other Companies

7 FUTURE OUTLOOK OF THE MARKET

8 APPENDIX

- 8.1 Macroeconomic Indicators (GDP Distribution by Activity, Contribution of Transport/Courier Industry to Economy)
- 8.2 Insights on capital flow
- 8.3 Exports and Import Statistics

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