

New Zealand Freight And Logistics - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)

Market Report | 2025-04-28 | 150 pages | Mordor Intelligence

AVAILABLE LICENSES:

- Single User License \$4750.00
- Team License (1-7 Users) \$5250.00
- Site License \$6500.00
- Corporate License \$8750.00

Report description:

The New Zealand Freight And Logistics Market size is estimated at USD 18.28 billion in 2025, and is expected to reach USD 21.41 billion by 2030, at a CAGR of 3.21% during the forecast period (2025-2030).

Key Highlights

- In the Waikato region, vital transport corridors like State Highway 1 and the main trunk rail line underscore the significance of the Freight and Logistics sector as a key economic driver. In New Zealand, road freight leads the way, constituting nearly 70% of freight movement by ton-kilometre and surpassing 90% by volume. While rail may be on a smaller scale, it plays a crucial role in connecting major cities such as Auckland, Tauranga, and Hamilton.
- Looking forward, projections indicate that over 90% of freight will continue to be road-based. The Golden Triangle region, encompassing Auckland, Tauranga, and Hamilton, is set to manage 42% of the nation's total freight. This demand surge over the next 25 years is attributed to population growth and economic expansion. Between 2020 and 2030, freight volumes in the Waikato and Bay of Plenty regions could witness a rise of 47% to 65%, underscoring the urgent need for enhanced logistics infrastructure and workforce development.
- In Waikato, the sector boasts a workforce of over 7,000, with a pronounced demand for skilled positions such as truck drivers and logistics planners. The workforce leans male and is predominantly low-skilled, increasingly leaning on migrant labor, especially in postal and courier services. Yet, challenges loom with intensifying workforce shortages in truck driving and logistics. In response, there's a concerted effort to expand training programs and higher education avenues.
- A pivotal initiative, the Freight Action Plan for the Golden Triangle, underscores the urgency to bolster network capacity, tackle skills shortages, and adopt emerging technologies like hydrogen. While the sector stands on the brink of growth, it grapples with challenges in workforce attraction and infrastructure expansion.

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

New Zealand Freight And Logistics Market Trends

Increase in cross-border trade driving the market

- The EU-New Zealand Free Trade Agreement (FTA) is poised to reshape the freight and logistics landscape, bolstering trade volumes and unveiling fresh prospects for logistics providers in both territories. With the FTA dismantling trade barriers, there's an anticipated surge in demand for transporting goods-ranging from agricultural produce and consumer items to premium exports like wine and specialty foods.
- EU exporters, benefiting from zero tariffs on exports to New Zealand and streamlined access to New Zealand's government contracts, are set to amplify shipments in sectors such as agriculture, electronics, and machinery. Projected annual growth of up to EUR 4.5 billion in EU exports to New Zealand signals a notable uptick in freight volumes between the two regions. This escalation will challenge current logistics infrastructures, necessitating expanded capacities in shipping, air freight, and overland transport, especially for in-demand goods like pork, wine, and specialty items.
- To manage this heightened trade volume, logistics providers must refine operations and boost efficiency. The FTA's emphasis on digital trade and streamlined cross-border transactions heralds a wave of innovation in logistics. This includes harnessing digital tools for shipment tracking, optimizing customs processes, and minimizing paperwork. Coupled with technological advancements, this will forge a more agile and efficient supply chain between the EU and New Zealand.
- Moreover, the FTA's dedication to sustainability might steer the logistics sector towards greener technologies, such as low-emission vehicles and energy-efficient shipping, aligning with environmental benchmarks.
- An anticipated 80% surge in EU investments in New Zealand could further amplify the demand for infrastructure enhancements-think freight hubs, warehouses, and transport networks-propelling the logistics sector's growth. In essence, the EU-NZ FTA is set to invigorate the freight and logistics market, amplifying trade volumes and ushering in a wave of digital and sustainable innovations.

E-commerce Growth in New Zealand is Driving the Logistics Sector

- New Zealand's booming e-commerce scene is reshaping its freight and logistics landscape. Factors like widespread internet access, rising smartphone adoption, and the allure of omnichannel shopping are propelling online sales. Projections indicate e-commerce sales will jump from NZD 5.55 billion in 2023 to NZD 6.53 billion in 2024, pushing logistics firms to scale up operations to manage the surge in goods transport.
- Grocery shopping, which makes up 25% of online purchases, intensifies the demand for logistics. As online grocery shopping gains traction, retailers are pressed to establish supply chains adept at handling perishables and offering swift delivery options. Beyond groceries, sectors like clothing and general retail are witnessing a surge in online spending, necessitating expanded warehousing and distribution capabilities to manage the influx of orders.
- Omnichannel shopping, where consumers scout online before purchasing in-store, amplifies logistics demands. Businesses must adeptly manage inventory across platforms, integrating systems for real-time stock tracking and smooth order fulfillment, be it direct shipping or in-store pickups.
- The international e-commerce surge, coupled with diverse payment methods, is amplifying cross-border logistics. Both local and international retailers are racing to transport goods efficiently, meeting consumer demands. Embracing technologies like AI and blockchain is streamlining supply chains, enhancing route optimization, real-time tracking, and bolstering security, aligning logistics firms with e-commerce expectations.
- With rising consumer demand for eco-friendly practices, sustainability is becoming paramount in New Zealand's logistics. From green shipping and reduced packaging waste to optimized delivery routes, logistics firms are innovating to resonate with the

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

eco-conscious consumer. In essence, as e-commerce flourishes in New Zealand, the freight and logistics sector is evolving, emphasizing efficiency, scalability, and sustainability.

New Zealand Freight And Logistics Industry Overview

The New Zealand freight and logistics market is fragmented, with the presence of both international and local players. The market is rapidly evolving, driven by e-commerce growth, heightened consumer expectations, and a push for efficiency and sustainability. Competition is shaped by factors like service diversification, tech innovation, customer service, and a commitment to environmental sustainability. Major players include Mainfreight, Toll Group, and NZ Post, with a notable emphasis on e-commerce. As the market grows, challenges like labor shortages and rising operational costs persist, but the outlook remains positive, especially for those prioritizing integrated solutions and sustainability.

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 Methodology
- 2.2 Research Phases

3 EXECUTIVE SUMMARY

4 MARKET INSIGHTS

- 4.1 Current Market Scenario
- 4.2 Technological Developments in the Market
- 4.3 Government Regulations and Initiatives
- 4.4 Industry Value Chain/Supply Chain Analysis
- 4.5 Brief on Freight Transportation Costs/Freight Rates in New Zealand
- 4.6 Spotlight on the E-commerce Market
- 4.7 Brief on the 3PL Market in New Zealand
- 4.8 Insights into the Courier, Express, and Parcel (CEP) Market
- 4.9 Demand and Supply Analysis
- 4.10 Commentary on Trucking Operating Costs
- 4.11 Spotlight on Key Logistics Hubs and Cities in New Zealand
- 4.12 Impact of Geopolitics and Pandemic on the Market

5 MARKET DYNAMICS

- 5.1 Market Drivers
 - 5.1.1 Increase in global trade activities
 - 5.1.2 Increase in infrastructure and construction

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

5.2 Market Restraints

5.2.1 Geographical challenges contribute to increased transportation costs

5.3 Market Opportunities

5.3.1 Expanding demand for its agriculture and other export products

5.4 Industry Attractiveness - Porter's Five Forces Analysis

5.4.1 Bargaining Power of Suppliers

5.4.2 Bargaining Power of Consumers

5.4.3 Threat of New Entrants

5.4.4 Threat of Substitutes

5.4.5 Intensity of Competitive Rivalry

6 MARKET SEGMENTATION

6.1 By Function

6.1.1 Freight Transport

6.1.1.1 Road

6.1.1.2 Shipping and Inland Water

6.1.1.3 Air

6.1.1.4 Rail

6.1.2 Freight Forwarding

6.1.3 Warehousing

6.1.4 Value-added Services and Other Functions

6.2 By End-User

6.2.1 Manufacturing and Automotive

6.2.2 Oil and Gas, Mining, and Quarrying

6.2.3 Agriculture, Fishing, and Forestry

6.2.4 Construction

6.2.5 Distributive Trade (Wholesale and Retail Segments (FMCG Included))

6.2.6 Other End-Users (Telecommunication, Pharmaceuticals, and F&B)

7 COMPETITIVE LANDSCAPE

7.1 Market Concentration Overview

7.2 Company Profiles

7.2.1 Deutsche Post DHL Group

7.2.2 Yusen Logistics Co. Ltd.

7.2.3 Hellmann Worldwide Logistics Limited

7.2.4 CEVA Logistics

7.2.5 Linfox Pty Ltd.

7.2.6 Kuehne + Nagel International AG

7.2.7 FedEx Corporation

7.2.8 DB Schenker

7.2.9 DSV

7.2.10 Mainfreight Limited

7.2.11 Cardinal Logistics

7.2.12 Carrolls Cartage Limited

7.2.13 First Global Logistics

7.2.14 TIL Logistics Group Limited

7.2.15 Toll Group

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

- 7.2.16 K&S Corporation Limited
- 7.2.17 Online Distribution Ltd.
- 7.2.18 Freightways Ltd.
- 7.2.19 New Zealand Post Ltd.*
- 7.3 Other Companies (Key Information/Overview)

8 FUTURE OUTLOOK OF THE MARKET

9 APPENDIX

- 9.1 GDP Distribution, by Activity and Region
- 9.2 Insights into Capital Flows
- 9.3 Economic Statistics - Transport and Storage Sector, Contribution to Economy
- 9.4 External Trade Statistics - Export and Import, by Product
- 9.5 Insights into Key Export Destinations
- 9.6 Insights into Key Import Origin Countries

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

New Zealand Freight And Logistics - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)

Market Report | 2025-04-28 | 150 pages | Mordor Intelligence

To place an Order with Scotts International:

- Print this form
- Complete the relevant blank fields and sign
- Send as a scanned email to support@scotts-international.com

ORDER FORM:

Select license	License	Price
	Single User License	\$4750.00
	Team License (1-7 Users)	\$5250.00
	Site License	\$6500.00
	Corporate License	\$8750.00
		VAT
		Total

*Please circle the relevant license option. For any questions please contact support@scotts-international.com or 0048 603 394 346.

** VAT will be added at 23% for Polish based companies, individuals and EU based companies who are unable to provide a valid EU Vat Numbers.

Email*	<input type="text"/>	Phone*	<input type="text"/>
First Name*	<input type="text"/>	Last Name*	<input type="text"/>
Job title*	<input type="text"/>		
Company Name*	<input type="text"/>	EU Vat / Tax ID / NIP number*	<input type="text"/>
Address*	<input type="text"/>	City*	<input type="text"/>
Zip Code*	<input type="text"/>	Country*	<input type="text"/>
		Date	<input type="text" value="2026-03-01"/>
		Signature	

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

