

North America Road Freight Transport - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)

Market Report | 2025-04-28 | 325 pages | Mordor Intelligence

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Report description:

The North America Road Freight Transport Market size is estimated at 660.2 billion USD in 2025, and is expected to reach 797.3 billion USD by 2030, growing at a CAGR of 3.84% during the forecast period (2025-2030).

The manufacturing and wholesale & retail trade sectors support the growth of the road freight market

- The United States manufacturing sector, a major driver of truck freight, returned to expansion in early 2024, signaling a recovery in industrial activity and increased demand for transportation services. Moreover, manufactured goods exports reached USD 113 billion in June 2024, up from USD 111.9 billion in May 2024. Similarly, in the first six months of 2024, manufactured goods exports reached USD 658 billion, up 2.62% compared to the same period last year. The upturn in manufacturing exports is significantly contributing to increased road freight demand.
- In July 2024, the US government allocated USD 160 million in grants to develop environmental product declarations (EPDs) and advance the use of low-carbon construction materials, enhancing sustainability in the construction industry. This investment aims to cut the carbon footprint of new constructions, supporting the national goal of net-zero emissions by 2050. The US is focusing on advancing EPDs for carbon-intensive materials like concrete and steel. In 2023 alone, the GSA's pilot program created 17,000 EPDs. As the industry shifts towards using low-carbon materials, the trucking industry is expected to see a rise in the transportation of these specialized products.

United States dominates the North American trucking market, which is expected to improve further due to investments in road infrastructure

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- The US dominated the North American road freight transport market in 2022-2023. Mexico was the largest trade partner to the US in 2022. Substantially, major road freight operations in North America take place in the United States, Mexico, and Canada. The total trans-border freight amounted to USD 125.8 billion in January 2023, registering a growth of 10% YoY. Trucks moved nearly 62% of the total freight (in value). Detroit, Port Huron, and Buffalo are the top truck ports for the freight flows between the United States and Canada, while Laredo, El Paso, and Otay Mesa are the top truck ports within Mexico.
- There are road infrastructure projects that may be completed in the coming years, which would further improve the trucking industry. These projects include the Gordie Howe International Bridge in Canada, which is expected to improve the transportation between the United States and Canada. In the United States, Pyramid Highway Improvement was proposed, which is forecast to be complete by 2025. The Interstate 680 Express Lane and Pavement Rehabilitation may improve the freight mobility of I-680, preserve the transportation system's condition, and improve system performance. There is also a substantial investment in electric vehicles by major companies. All these factors are set to drive the road freight in coming years.

North America Road Freight Transport Market Trends

The US dominates with maximum regional GDP contribution, fueled by an infrastructure program that boosts ports and supply chains

- An efficient and reliable transportation system is crucial for the economy. Through the National Trade Corridors Fund, the Government of Canada invests in improving supply chains, reducing trade barriers, and fostering business growth for future economic opportunities. In May 2024, the Minister of Transport announced up to USD 51.2 million for 19 digital infrastructure projects under this fund. The Canadian government aims to enhance supply chains with innovative technologies to expedite and reduce costs for Canadians. This initiative will drive collaboration with stakeholders nationwide on digital projects to address transportation bottlenecks, vulnerabilities, and port congestion effectively.
- In United States, infrastructure development and the rise of e-commerce are anticipated to boost employment in the transportation and storage sector. According to the Bureau of Labor Statistics (BLS), this sector is projected to grow at a rate of 0.8% annually from 2022 to 2032, resulting in the addition of nearly 570,000 jobs during that timeframe. The couriers and messengers industry, along with warehousing and storage, are expected to contribute significantly to about 80% of the sector's projected job growth.

Rising tensions in the Middle East are expected to affect crude oil supplies and lead to sudden price hikes in the region

- By October 2024, just ahead of the presidential election, gasoline prices in the US were projected to dip below USD 3 a gallon for the first time in over 3 years. This decline in fuel prices, primarily driven by waning demand and decreasing oil prices, offered a reprieve to consumers who had been grappling with elevated costs contributing to inflation. Such a development could have bolstered Vice President Kamala Harris and other Democrats in addressing Republican critiques regarding soaring gas prices. As of September 2024, regular gas averaged USD 3.25 a gallon, marking a 19-cent drop from the previous month and a 58-cent YoY decrease.
- Annual maintenance on Canada's oil sands plants in 2024 is expected to proceed normally. However, trade union officials warn of a labor shortage in Alberta's 2025 turnaround season due to two new industrial projects. Alberta producers annually hire thousands of skilled workers for essential maintenance on oil sands upgraders, thermal projects, and refineries. As the world's

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fourth-largest oil producer, Canada gets about two-thirds of its 4.9 million barrels per day of crude from the northern Alberta oil sands. This shortage might raise fuel prices in 2025.

North America Road Freight Transport Industry Overview

The North America Road Freight Transport Market is fragmented, with the major five players in this market being C.H. Robinson, FedEx, J.B. Hunt Transport, Inc., Knight-Swift Transportation Holdings Inc. and Old Dominion Freight Line (sorted alphabetically).

Additional Benefits:

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

Table of Contents:

1 EXECUTIVE SUMMARY & KEY FINDINGS

2 REPORT OFFERS

3 INTRODUCTION

3.1 Study Assumptions & Market Definition

3.2 Scope of the Study?

3.3 Research Methodology

4 KEY INDUSTRY TRENDS

4.1 GDP Distribution By Economic Activity

4.2 GDP Growth By Economic Activity

4.3 Economic Performance And Profile

4.3.1 Trends in E-Commerce Industry

4.3.2 Trends in Manufacturing Industry

4.4 Transport And Storage Sector GDP

4.5 Logistics Performance

4.6 Length Of Roads

4.7 Export Trends

4.8 Import Trends

4.9 Fuel Pricing Trends

4.10 Trucking Operational Costs

4.11 Trucking Fleet Size By Type

4.12 Major Truck Suppliers

4.13 Road Freight Tonnage Trends

4.14 Road Freight Pricing Trends

4.15 Modal Share

4.16 Inflation

4.17 Regulatory Framework

4.18 Value Chain & Distribution Channel Analysis

5 MARKET SEGMENTATION (includes market size in Value in USD, Forecasts up to 2030 and analysis of growth prospects)

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- 5.1 End User Industry
 - 5.1.1 Agriculture, Fishing, and Forestry
 - 5.1.2 Construction
 - 5.1.3 Manufacturing
 - 5.1.4 Oil and Gas, Mining and Quarrying
 - 5.1.5 Wholesale and Retail Trade
 - 5.1.6 Others
- 5.2 Destination
 - 5.2.1 Domestic
 - 5.2.2 International
- 5.3 Truckload Specification
 - 5.3.1 Full-Truck-Load (FTL)
 - 5.3.2 Less than-Truck-Load (LTL)
- 5.4 Containerization
 - 5.4.1 Containerized
 - 5.4.2 Non-Containerized
- 5.5 Distance
 - 5.5.1 Long Haul
 - 5.5.2 Short Haul
- 5.6 Goods Configuration
 - 5.6.1 Fluid Goods
 - 5.6.2 Solid Goods
- 5.7 Temperature Control
 - 5.7.1 Non-Temperature Controlled
 - 5.7.2 Temperature Controlled
- 5.8 Country
 - 5.8.1 Canada
 - 5.8.2 Mexico
 - 5.8.3 United States
 - 5.8.4 Rest of North America

6 COMPETITIVE LANDSCAPE

- 6.1 Key Strategic Moves
- 6.2 Market Share Analysis
- 6.3 Company Landscape
- 6.4 Company Profiles
 - 6.4.1 A.P. Moller - Maersk
 - 6.4.2 ArcBest
 - 6.4.3 C.H. Robinson
 - 6.4.4 CMA CGM Group (including CEVA Logistics)
 - 6.4.5 DHL Group
 - 6.4.6 DSV A/S (De Sammensluttede Vognmand af Air and Sea)
 - 6.4.7 FedEx
 - 6.4.8 J.B. Hunt Transport, Inc.
 - 6.4.9 Knight-Swift Transportation Holdings Inc.
 - 6.4.10 Landstar System Inc.
 - 6.4.11 Old Dominion Freight Line

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- 6.4.12 Ryder System, Inc.
- 6.4.13 Schneider National, Inc.
- 6.4.14 United Parcel Service of America, Inc. (UPS)
- 6.4.15 Werner Enterprises Inc.
- 6.4.16 XPO, Inc.

7 KEY STRATEGIC QUESTIONS FOR ROAD FREIGHT CEOS

8 APPENDIX

- 8.1 Global Logistics Market Overview
 - 8.1.1 Overview
 - 8.1.2 Porter's Five Forces Framework
 - 8.1.3 Global Value Chain Analysis
 - 8.1.4 Market Dynamics (Market Drivers, Restraints & Opportunities)
- 8.2 Sources & References
- 8.3 List of Tables & Figures
- 8.4 Primary Insights
- 8.5 Data Pack
- 8.6 Glossary of Terms
- 8.7 Currency Exchange Rate

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