

US Air Freight Transport - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)

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Report description:

The US Air Freight Transport Market size is estimated at USD 58.78 billion in 2025, and is expected to reach USD 73.42 billion by 2030, at a CAGR of 4.55% during the forecast period (2025-2030).

Key Highlights

- The US air freight transport market is mainly driven by the surge in e-commerce activities and surge in demand for FMCG.
- E-commerce's explosive growth continues to drive air freight demand. This surge has led to an increased need for prompt deliveries, pushing logistics providers to bolster their capabilities and streamline operations to align with consumer expectations for swift shipments.
- In June 2024, air freight between the US and global destinations rose by 5% from 2023, totaling 1,036,907 tons. US airlines were responsible for transporting 47% of this international freight, with charter services making up 21% of the total traffic.
- For the year ending June 2024, the leading international gateways for US freight were China, South Korea, Japan, Hong Kong, and Germany. Among the top 25 country markets, 14 saw an increase in freight traffic, while 11 experienced a decline. Notably, Belgium, among the declining markets, recorded the steepest drop at 12% compared to 2023. The US flag share dynamics varied: it decreased in 14 markets, remained steady in four, and saw an uptick in seven others.
- Technological advancements are significantly transforming air freight operations, improving efficiency and reliability. In July 2024, Siemens Digital Industries Software revealed that Natilus, a US-based aerospace firm, has integrated the Siemens Xcelerator suite into its operations. With a vision to revolutionize global supply chains via its innovative blended-wing-body aircraft, Natilus has leveraged Siemens software to slash its inaugural prototype's development time by half.

US Air Freight Transport Market Trends

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US Air Freight Market Set for Growth Amid Rising International Trade Demand

In 2024, the US air freight transport market is poised for significant growth in international trade demand, driven by factors such as economic recovery, the expansion of e-commerce, and shifting geopolitical dynamics.

In recent years, the US e-commerce sector has witnessed unprecedented growth. By 2023, sales surpassed the USD 1 trillion mark, propelled by industry giants like Amazon and Walmart, alongside smaller platforms such as Etsy and eBay.

In 2023, US freight trade with Canada and Mexico reached a value of USD 1.57 trillion. This trade accounted for a total weight of 2,484.7 million tons. Although the weight of the freight saw an 8.8% increase from 2022, the dollar value of North American freight held steady in 2023.

For over 25 years, the United States has championed the expansion of international aviation markets through its "Open Skies" policy. These bilateral and multilateral agreements eliminate government-imposed limitations on airline operations between countries. They dictate the number of airlines permitted, the routes they can take, the pricing strategies they can adopt, and the aircraft they must utilize. Furthermore, these agreements foster collaboration between US and foreign airlines, enabling US cargo and express delivery carriers to transport freight and parcels seamlessly. The scope of Open Skies spans passenger and cargo aviation, covering both scheduled and charter flights. Thus far, the US has forged Open Skies agreements with over 125 partners, spanning every continent and developmental stage.

US Electrical Machinery and Electronics Trade: A Year of Growth Amidst a Trade Deficit

In August 2024, the US exported USD 19.8 Billion worth of electrical machinery and electronics, while imports reached USD 40.9 Billion, leading to a trade deficit of USD 21 Billion. From August 2023 to August 2024, US exports in this sector rose by USD 2.32 Billion (13.3%), climbing from USD 17.5 Billion to USD 19.8 Billion. In contrast, imports saw a USD 3.26 Billion (8.68%) uptick, moving from USD 37.6 Billion to USD 40.9 Billion.

In August 2024, the US primarily exported electrical machinery and electronics to Mexico (USD 5 Billion), Canada (USD 2.44 Billion), China (USD 1.67 Billion), Malaysia (USD 1.65 Billion), and Hong Kong (USD 702 Million). Conversely, imports were predominantly sourced from China (USD 10.4 Billion), Mexico (USD 7.85 Billion), Vietnam (USD 3.37 Billion), Chinese Taipei (USD 3.03 Billion), and Malaysia (USD 2.38 Billion).

The year-on-year rise in US exports of electrical machinery and electronics in August 2024 was largely driven by boosts in shipments to Mexico (USD 383 million or 9.62%), Canada (USD 350 million or 17.9%), and Poland (USD 165 million or 122%). On the import side, the uptick was mainly due to increased purchases from Mexico (USD 816 million or 14.3%), Thailand (USD 687 million or 67.8%), and India (USD 521 million or 150%).

US Air Freight Transport Industry Overview

The US air freight transport market landscape is fragmented, with a mix of regional and international players. Key players in the market include DHL, United Parcel Services Inc., Expeditors International, Hellmann Worldwide Logistics, DB Schenker, etc.

As companies embrace technology-driven solutions and seek efficient distribution channels, they find themselves strategically positioned to seize emerging opportunities in the industry.

As of October 2024, DHL Express and DHL Global Forwarding are advancing their sustainability initiatives by renewing a contract

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with IAG Cargo, the cargo handling arm of International Airlines Group (IAG). This partnership will see the use of an extra 60 million liters of Sustainable Aviation Fuel (SAF) for DHL's operations. Spanning the years 2024 and 2025, the renewed contract is projected to cut down greenhouse gas emissions by roughly 165,000 metric tons of CO₂e.

Additional Benefits:

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

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