

India Freight Forwarding Market Assessment, By Mode of Transport [Air, Ocean, Rail, Road], By Application [Industrial and Manufacturing, Retail, Healthcare, Media and Entertainment, Military, Oil and Gas, Food and Beverages, Others], By Customer Type [Business-to-Business, Business-to-Customer], By Service [Transportation, Warehousing, Packaging and Documentation, Insurance, Value-Added Services], By Region, Opportunities and Forecast, FY2019-FY2033F

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Report description:

India freight forwarding market is projected to witness a CAGR of 5.65% during the forecast period FY2026-FY2033, growing from USD 13.57 billion in FY2025 to USD 21.06 billion in FY2033 due to e-commerce boom, technological advancements and digitalization, government reforms, global trade growth and more. India freight forwarding market has evolved from transactional cargo booking to a strategic logistics backbone. As global trade routes shift and India positions itself as a manufacturing and export powerhouse under schemes such as Make in India and PLI, freight forwarders have become critical in connecting suppliers, ports, and customers, not just domestically, but across continents.

While traditional modes such as road and rail still dominate in volume, air and ocean forwarding are gaining complexity and speed, especially for high-value goods. Tech-driven consolidation, warehousing integration, and customs automation are changing how freight forwarding is delivered and priced. Presently, organizations are offering real-time tracking, multimodal coordination, and end-to-end visibility, and India's top players are investing heavily to stay ahead.

From e-commerce bulk exports to pharma-sensitive shipments, freight forwarders in India are scaling through technology, M&A, and deep sector specialization.

For instance, in May 2025, CEVA strengthened its presence in India by opening a new corporate office in Mumbai and expanding

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across 70 facilities spanning 7.7 million sq ft in 21 cities. This move supports its strategy to capture domestic demand and support the 'Make in India' initiative, signaling serious growth momentum for its forwarding business.

Tech-Driven Multimodal Expansion and Infrastructure Boost to Fuel the Market Growth

India's National Logistics Policy (NLP), Gati Shakti master plan, and private sector digitization efforts are transforming how freight is forwarded, especially across modes. In October 2023, Allcargo Logistics launched its "LCL Digital Platform" for seamless less-than-container load booking across road and sea. It is part of their move toward multimodal aggregation hubs that link ICDs with seaports through rail and truck corridors.

Meanwhile, the Dedicated Freight Corridors (DFCs) have drastically improved transit time predictability for freight forwarders relying on rail. Key hubs such as Dadri and Khurja are seeing reductions in turnaround time for containerized shipments, allowing forwarders to integrate rail more confidently in their plans. The combination of real-time visibility tools and multimodal infrastructure is turning Indian freight forwarding from fragmented to optimized.

Rise in Specialized Logistics Demand from Healthcare and Pharma to Shape the Market

India's pharmaceutical and healthcare sectors have become critical clients for freight forwarders, especially post-pandemic. The movement of sensitive APIs, vaccines, and temperature-controlled goods now requires logistics partners who can deliver both compliance and speed.

For instance, in April 2025, A new state-of-the-art 90,000sqft frozen warehouse opened in Detroj, Gujarat, dedicated to cold-chain needs, including pharmaceuticals. Equipped with a 10,000-pallet ASRS system capable of operating at -20degrees Celsius, it supports precision logistics through real-time WMS traceability and energy-efficient design. This development underscores the growing requirement for specialized, temperature-controlled infrastructure to safely manage pharma products from storage through transportation.

In December 2024, Flipkart introduced 'Flipkart Minutes' in Bengaluru, Delhi NCR, and Mumbai, offering 10-minute delivery of medicines. This quick-commerce initiative caters to urgent, temperature-sensitive healthcare needs, prompting logistics providers to expand refrigerated vehicle fleets and refine last-mile cold-chain capabilities for home delivery. Pharma is no longer just a value segment; it is now defining standards in documentation, packaging, and multimodal integrity.

Ocean Freight Dominance Amid Global Realignment of Supply Chains

With China+1 strategies, India's export lanes are seeing record container movements. Ocean freight, particularly full container load (FCL) and LCL exports, now anchors the revenue mix for freight forwarders. India's Major Ports marked a significant milestone in FY2024-FY2025, registering a robust 4.3% annual growth in cargo handling. Total cargo throughput rose from 819 million tonnes in FY2023-FY2024 to approximately 855 million tonnes in FY2024-FY2025, underlining the ports' resilience and growing capacity to accommodate increasing trade volumes. The surge was fueled by a 10% rise in container throughput, a 13% jump in fertilizer cargo, a 3% increase in petroleum, oil, and lubricants (POL) cargo, and a notable 31% growth in miscellaneous commodities.

Among the cargo handled, POL led with 254.5 million tonnes (29.8%), followed by containers at 193.5 million tonnes (22.6%), and coal at 186.6 million tonnes (21.8%). Other major commodities included iron ore, pellets, and fertilizers.

In February 2025, A.P. Moller - Maersk and Cochin Shipyard Limited (CSL) entered a Memorandum of Understanding (MoU) to collaborate on ship repair, maintenance, and construction activities in India. This partnership aligns with the Government of India's Vision 2047 and recent budget initiatives aimed at establishing India as a top global maritime hub. The MoU focuses on several key areas, including sharing technical expertise to meet international standards in ship maintenance, exploring new opportunities in ship repair, dry docking, and shipbuilding, as well as conducting joint training programs to promote responsible practices. Additionally, the collaboration will drive skill development for both CSL employees and Maersk seafarers. This strategic alliance comes at a time when the global shipping industry is facing capacity constraints in ship repair, positioning India to emerge as a premier maritime service center. Maersk will leverage its global fleet management experience to strengthen CSL's capabilities, with a particular emphasis on container ship operations.

Impact of U.S. Tariffs on the India Freight Forwarding Market

U.S. tariffs have had a multifaceted impact on India's freight forwarding market. As trade tensions with China escalated, global manufacturers and exporters began rerouting supply chains, creating a new window of opportunity for Indian exporters. This shift boosted the demand for freight forwarding services, especially for handling shipments redirected from other Asian hubs. At the

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same time, increased complexity in customs compliance and documentation drove up demand for freight forwarders with strong regulatory and trade advisory capabilities. Many Indian forwarders have since expanded their service offerings to include HS code guidance, dynamic routing, and duty optimization. Additionally, as tariffs reshaped traditional trade lanes, Indian freight forwarders have had to adapt quickly, investing in multimodal flexibility and regional export corridors to meet evolving client needs. Overall, while U.S. tariffs introduced challenges in cost and planning, they also accelerated India's emergence as a preferred global logistics alternative.

Key Players Landscape and Outlook

India's freight forwarding sector is led by a mix of global integrators and agile domestic players. Giant global companies offer integrated air-sea-road forwarding with customs support, while Indian leaders such as Allcargo Logistics are rapidly digitizing consolidation and LCL booking. C.H. Robinson and Kerry Logistics are entering niche sectors, including express e-commerce and pharma freight, while Nippon Express and DSV India continue to build scale in industrial forwarding and rail-sea integration. Competition is shifting from rate cards to reliability, real-time tracking, multimodal agility, and customs compliance are now the differentiators. As Indian exports grow and policy supports scale, freight forwarders are no longer just middlemen, they are becoming orchestrators of India's global supply chain.

For instance, in May 2025, ADRA India signed an MoU with DHL Group to boost the speed and effectiveness of emergency relief during natural disasters across India. Under the agreement, DHL provides free logistics support, including handling, sorting, inventory management, and temporary storage of relief materials at key entry points such as airports. This partnership enables ADRA India to focus on delivering aid while DHL's Disaster Response Team brings specialized expertise in managing emergency logistics. The collaboration underscores ADRA India's commitment to preparedness and locally led humanitarian action.

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*Companies mentioned above DO NOT hold any order as per market share and can be changed as per information available during research work.

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