

## **Australia Freight And Logistics - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2026 - 2031)**

Market Report | 2026-01-16 | 391 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:**

Australia Freight And Logistics Market Analysis

The Australia freight and logistics market was valued at USD 99.08 billion in 2025 and estimated to grow from USD 103.2 billion in 2026 to reach USD 126.52 billion by 2031, at a CAGR of 4.16% during the forecast period (2026-2031). Growth reflects the sector's resilience during supply-chain shocks and its rapid pivot toward e-commerce fulfillment, decentralized inventory models, and regional distribution networks. Public-sector spending, led by the USD 14.5 billion Inland Rail program, is lowering route costs by as much as 20% and catalyzing a long-term shift from road to rail on the key Melbourne-Brisbane corridor. Parallel port-automation projects, together with digital freight-visibility platforms, are trimming idle time and expanding asset utilization. Technology adoption—from AI-based route optimization to warehouse automation—is compressing delivery windows while tempering wage and fuel-price pressures. At the same time, sustainability mandates are steering large operators toward electric trucks, autonomous rail, and low-carbon warehousing, creating fresh avenues for competitive differentiation.

Australia Freight And Logistics Market Trends and Insights

E-commerce Boom Accelerating B2C Parcel Volumes

E-commerce parcel traffic grew 15% in 2024, prompting Australia Post to extend same-day coverage to 85% of Sydney and Melbourne postcodes. Chinese marketplace entrants such as Temu added 1.66 million local users, injecting new demand peaks that strain last-mile capacity. Fulfillment models are shifting toward micro-warehouses near population centers, reducing facility

**Scotts International. EU Vat number: PL 6772247784**

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

[www.scotts-international.com](http://www.scotts-international.com)

footprints by 30% yet lifting throughput per square meter by 25%. Regional carriers have responded with hub-and-spoke networks that bypass legacy metro sortation, trimming interstate delivery times by up to one day. These dynamics are set to keep CEP volumes on a 5%-plus annual trajectory, reinforcing the growth outlook for the Australia freight and logistics market.

### Large-Scale Public Infrastructure Pipeline

The 1,700 km Inland Rail, on track for completion in 2027, will shorten Melbourne-Brisbane transit by 10 hours and lower end-to-end costs by 20% for bulk and container loads. In parallel, Sydney's Autostrad Botany Rail Expansion is boosting container-port throughput by 40% via automated stacking cranes. These projects, along with targeted road upgrades, elevate rail's share of intercapital freight from 49% in 2024 to a projected 55% by 2030. Real-time asset-health monitoring and predictive maintenance further reduce unscheduled downtime by roughly one-third, underpinning stable capacity growth.

### Acute Truck-Driver Shortage and Ageing Workforce

Eighty percent of road-freight operators report unfilled positions, with a national deficit of 26,000 drivers projected by 2030. The average driver age is 52 and only 12% are under 35, creating succession risk. Mandatory multi-year licensing and insurance hurdles deter younger entrants, particularly in remote regions where route conditions add training complexity. Wage inflation reached 8.5% in 2024, eroding operating margins across the Australia freight and logistics market. Autonomous truck pilots in mining offer a glimpse of relief but scaling beyond controlled corridors will require harmonized road-safety legislation and roadside sensor infrastructure.

Other drivers and restraints analyzed in the detailed report include:

SME Shift Toward 3PL Outsourcing  
Expansion of Bilateral and Multilateral Trade Agreements  
High Fuel-Price Volatility and Surcharge Constraints

For complete list of drivers and restraints, kindly check the Table Of Contents.

### Segment Analysis

Manufacturing captured 24.45% of 2025 revenue, leveraging multimodal capacity for raw-material inflows and finished-goods exports. Construction logistics expanded alongside public-infrastructure pipelines, spurring demand for heavy-haul and project-cargo expertise.

Wholesale and retail trade is projected to rise at a 4.55% CAGR (2026-2031), mirroring omnichannel growth that multiplies micro-fulfillment nodes. Cold-chain volumes from pharmaceuticals and agriculture are growing quickly, underpinned by stricter temperature-integrity standards; their share of the Australia freight and logistics market size is expected to widen markedly through 2031.

Freight transport accounted for 64.10% of the Australia freight and logistics market in 2025 as bulk commodities and interstate replenishment routes drove high-tonnage demand. CEP, though smaller, is advancing at a 4.92% CAGR between 2026-2031 on last-mile e-commerce pressures. Temperature controlled warehousing grew steadily at a 4.10% CAGR (2026-2031), buoyed by decentralization that puts stock closer to shoppers.

Growing parcel densities and customer expectations for same-day windows are nudging retailers to outsource fulfillment, expanding CEP's revenue base faster than the overall Australia freight and logistics market size. Meanwhile, freight forwarding's 4.52% CAGR reflects the complexity of cross-border compliance and the appetite for bundled visibility and brokerage services.

The Australia Freight and Logistics Market Report is Segmented by Logistics Function (Courier Express, and Parcel (CEP), Freight Forwarding, Freight Transport, Warehousing and Storage, and Other Services), and by End User Industry (Agriculture, Fishing, and Forestry, Construction, Manufacturing, Oil and Gas, Mining and Quarrying, Wholesale and Retail Trade, and Others). The Market Forecasts are Provided in Terms of Value (USD).

List of Companies Covered in this Report:

Aurizon Holdings Limited Australia Post Group Centurion CouriersPlease Pty Ltd. DHL Group DSV A/S (Including DB Schenker) FedEx Freightways Ltd. Japan Post Holdings Co., Ltd. KandS Group Kuehne+Nagel Linfox Pty Ltd. LINX Cargo Care Group Mainfreight Ltd. MOVE Logistics (Including TNL International) Pacific National Pty Ltd. Qube Holdings, Ltd. Silk Logistics Holdings Ltd. United Parcel Service of America, Inc. (UPS) Wiseway Logistics Pty Ltd.

Additional Benefits:

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

#### **Table of Contents:**

1 Introduction  
1.1 Study Assumptions and Market Definition  
1.2 Scope of the Study  
  
2 Research Methodology

3 Executive Summary

4 Market Landscape  
4.1 Market Overview  
4.2 Demographics  
4.3 GDP Distribution by Economic Activity  
4.4 GDP Growth by Economic Activity  
4.5 Inflation  
4.6 Economic Performance and Profile  
4.6.1 Trends in E-Commerce Industry  
4.6.2 Trends in Manufacturing Industry  
4.7 Transport and Storage Sector GDP  
4.8 Export Trends  
4.9 Import Trends  
4.10 Fuel Price  
4.11 Trucking Operational Costs  
4.12 Trucking Fleet Size by Type  
4.13 Major Truck Suppliers  
4.14 Logistics Performance  
4.15 Modal Share  
4.16 Maritime Fleet Load Carrying Capacity  
4.17 Liner Shipping Connectivity

**Scotts International. EU Vat number: PL 6772247784**

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

- 4.18 Port Calls and Performance
- 4.19 Freight Pricing Trends
- 4.20 Freight Tonnage Trends
- 4.21 Infrastructure
- 4.22 Regulatory Framework (Road and Rail)
- 4.23 Regulatory Framework (Sea and Air)
- 4.24 Value Chain and Distribution Channel Analysis
- 4.25 Market Drivers
  - 4.25.1 E-Commerce Boom Accelerating B2C Parcel Volumes
  - 4.25.2 Large-Scale Public Infrastructure Pipeline (Inland Rail, Port Automation)
  - 4.25.3 SME Shift Toward 3PL Outsourcing
  - 4.25.4 Expansion of Bilateral and Multilateral Trade Agreements
  - 4.25.5 Rapid Uptake of Digital Freight-Matching and Visibility Platforms
  - 4.25.6 Remote-Area Mining Drone Logistics Corridors
- 4.26 Market Restraints
  - 4.26.1 Acute Truck-Driver Shortage and Ageing Workforce
  - 4.26.2 High Fuel-Price Volatility and Surcharge Pass-Through Limits
  - 4.26.3 Stringent Bio-Security Inspections Delaying Cross-Border Flows
  - 4.26.4 Industrial-Relations Disruptions at Major Ports
- 4.27 Technology Innovations in the Market
- 4.28 Porter's Five Forces Analysis
  - 4.28.1 Threat of New Entrants
  - 4.28.2 Bargaining Power of Buyers
  - 4.28.3 Bargaining Power of Suppliers
  - 4.28.4 Threat of Substitutes
  - 4.28.5 Competitive Rivalry

## 5 Market Size and Growth Forecasts (Value, USD)

- 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 Logistics Function
  - 5.2.1 Courier, Express, and Parcel (CEP)
    - 5.2.1.1 By Destination Type
      - 5.2.1.1.1 Domestic
      - 5.2.1.1.2 International
    - 5.2.2 Freight Forwarding
      - 5.2.2.1 By Mode of Transport
        - 5.2.2.1.1 Air
        - 5.2.2.1.2 Sea and Inland Waterways
        - 5.2.2.1.3 Others
      - 5.2.3 Freight Transport
        - 5.2.3.1 By Mode of Transport

5.2.3.1.1 Air  
5.2.3.1.2 Pipelines  
5.2.3.1.3 Rail  
5.2.3.1.4 Road  
5.2.3.1.5 Sea and Inland Waterways

5.2.4 Warehousing and Storage  
5.2.4.1 By Temperature Control  
5.2.4.1.1 Non-Temperature Controlled  
5.2.4.1.2 Temperature Controlled  
5.2.5 Other Services

## 6 Competitive Landscape

6.1 Market Concentration

6.2 Key Strategic Moves

6.3 Market Share Analysis

6.4 Company Profiles (Includes Global Level Overview, Market Level Overview, Core Segments, Financials as Available, Strategic Information, Market Rank/Share for Key Companies, Products and Services, and Recent Developments)

6.4.1 Aurizon Holdings Limited

6.4.2 Australia Post Group

6.4.3 Centurion

6.4.4 CouriersPlease Pty Ltd.

6.4.5 DHL Group

6.4.6 DSV A/S (Including DB Schenker)

6.4.7 FedEx

6.4.8 Freightways Ltd.

6.4.9 Japan Post Holdings Co., Ltd.

6.4.10 KandS Group

6.4.11 Kuehne+Nagel

6.4.12 Linfox Pty Ltd.

6.4.13 LINX Cargo Care Group

6.4.14 Mainfreight Ltd.

6.4.15 MOVE Logistics (Including TNL International)

6.4.16 Pacific National Pty Ltd.

6.4.17 Qube Holdings, Ltd.

6.4.18 Silk Logistics Holdings Ltd.

6.4.19 United Parcel Service of America, Inc. (UPS)

6.4.20 Wiseway Logistics Pty Ltd.

## 7 Market Opportunities and Future Outlook

7.1 White-space and Unmet-Need Assessment

**Australia Freight And Logistics - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2026 - 2031)**

Market Report | 2026-01-16 | 391 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"/>	EU Vat / Tax ID / NIP number*	<input type="text"/>
Company Name*	<input type="text"/>	City*	<input type="text"/>
Address*	<input type="text"/>	Country*	<input type="text"/>
Zip Code*	<input type="text"/>	Date	<input type="text" value="2026-02-12"/>

Signature

**Scotts International. EU Vat number: PL 6772247784**

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

[www.scotts-international.com](http://www.scotts-international.com)



**Scotts International. EU Vat number: PL 6772247784**

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

[www.scotts-international.com](http://www.scotts-international.com)