

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

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Report description:

Hong Kong Freight And Logistics Market Analysis

The Hong Kong Freight And Logistics Market is expected to grow from USD 22.37 billion in 2025 to USD 23.21 billion in 2026 and is forecast to reach USD 27.95 billion by 2031 at 3.78% CAGR over 2026-2031.

Robust cross-border e-commerce growth, government-backed infrastructure upgrades, and increasing demand for temperature-controlled logistics underpin steady expansion. Competitive pressures from mainland China ports, elevated operating costs, and labor shortages moderate-but do not derail-growth momentum. Large-scale mergers such as DSV's purchase of DB Schenker and CK Hutchison's ports divestment reshape market structure, while automation investments at Hong Kong International Airport (HKIA) raise service efficiency. Warehouse oversupply near HKIA keeps rents soft, yet premium cold-chain facilities maintain pricing power.

Hong Kong Freight And Logistics Market Trends and Insights

Surge in Cross-Border E-Commerce Volumes

Greater Bay Area customs data show Shenzhen's cross-border e-commerce value growing roughly 35-fold in five years, funneling high-margin volumes into Hong Kong's air-cargo and express channels. Consumer penetration in local e-commerce reached 80.9% in 2023, reinforcing demand for same-day and next-day delivery. Operators such as HKTVmall opened fully automated

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warehouses to handle always-on order cycles, prompting courier firms to expand pickup density and invest in advanced sortation. Intensifying parcel flows lift CEP tonnage and support rising fulfillment center leasing, offsetting volume losses in traditional seaborne transshipment. However, service providers must re-optimize route planning to cope with peak-season volatility and rising return rates.

Government Investment in Smart Port and HKIA 3RS

HKIA's Three-Runway System commenced full operations in November 2024, lifting annual throughput capacity by 50% and reducing queuing delays. Complementary public funding of HKD 1 billion (USD 128.05 million) for the Hong Kong AI Research Institute channels research into autonomous yard vehicles, digital port community systems, and predictive cargo routing. DHL's EUR 377 million (USD 416.07 million) Central Asia Hub expansion aligns private capital with public upgrades, delivering real-time cargo visibility and shorter dwell times. Policy support also extends to low-altitude economy test beds that accelerate drone delivery pilots. These developments collectively elevate Hong Kong's competitiveness for time-critical shipments against Guangzhou or Shenzhen airports.

Escalating Fuel and Electricity Costs Amid Carbon Measures

Marine bunker surcharges and peak-season trucking fuel premiums weigh on operator margins, with carriers quoting fees of USD 1,125-1,700 per FEU in January 2025. Hong Kong's roadmap to carbon neutrality by 2050 layers costs for low-sulfur fuel and energy audits. Electricity tariffs remain high due to limited domestic generation, challenging operators of high-draw cold stores. Firms accelerate fleet renewal toward LNG trucks and explore power-purchase agreements to hedge price swings. Compliance with the IMO's Carbon Intensity Indicator adds reporting complexity for ship agents.

Other drivers and restraints analyzed in the detailed report include:

Growing Cold-Chain Demand from Pharma and F&B
Integration with Greater Bay Area and CEPA Benefits
Skilled-Labour Shortages in Warehousing and Trucking

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

Segment Analysis

Wholesale and retail trade delivered 35.42% share in 2025 and is set to grow fastest at 4.08% CAGR, underpinned by tourism rebound and luxury brand restocking. Retailers demand omnichannel fulfillment, spurring dark-store conversions and last-mile collaborations with ride-hailing fleets. Manufacturing continues to rely on Hong Kong as a distribution switchboard for high-value electronics and apparel, though some volume diverts to bonded zones in Shenzhen.

Construction logistics benefit from major railway and land-reclamation projects that require heavy lift and oversized cargo coordination. Oil, gas, and mining movements center on drilling equipment and metal concentrates; prospects brighten with impending LME warehouse accreditation. Other sectors, including healthcare and professional services create niche demand for document management, sensitive data storage, and secure destruction.

Freight transport controlled 58.45% of the Hong Kong freight and logistics market in 2025, reflecting entrenched road and maritime corridors connecting the city with Pearl River Delta factories. Courier, express, and parcel services are scaling fastest with a 4.44% CAGR to 2031, lifted by omnichannel retail and high import parcel ratios. The freight transport segment leverages the Hong Kong-Zhuhai-Macau Bridge for same-day trucking loops and remains the backbone for inbound components and outbound finished goods. Yet direct ocean services from Shenzhen challenge Hong Kong's transshipment role, nudging carriers to

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offer bundled customs brokerage and bonded trucking.

Warehousing and storage deliver steady cash flows; ambient facilities occupy 89.40% of total capacity, while temperature-controlled space grows to meet vaccine and gourmet food inflows. Freight forwarding maintains relevance through complex routing solutions, with sea and inland waterways accounting for 54.10% of forwarding value. Other services such as supply-chain consulting and customs advisory gain share as shippers seek visibility and compliance expertise. Integration of digital freight platforms and EDI interfaces reduces paperwork and strengthens customer retention.

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

List of Companies Covered in this Report:

Kerry Logistics Network EV Cargo Cargo Services Far East DHL Logistics Janco Holdings Limited Trans-Am Group Cainiao Smart Logistics Network SF Express DSV Sinotrans Limited FedEx Express UPS Ceva Logistics OTS Forwarding (HK) Ltd CN Logistics International Holdings Limited SEKO Global Logistics New Century Logistics Company Limited Linfox Crane Worldwide Logistics Toll Group

Additional Benefits:

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

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