

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

Market Report | 2026-01-16 | 150 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:

New Zealand Freight And Logistics Market Analysis

The New Zealand freight and logistics market size in 2026 is estimated at USD 19.13 billion, growing from 2025 value of USD 18.51 billion with 2031 projections showing USD 22.53 billion, growing at 3.33% CAGR over 2026-2031. Robust infrastructure spending, fast-rising e-commerce volumes, and a renewed policy focus on supply-chain resilience keep the growth trajectory firmly positive for the New Zealand freight and logistics market. Continuous digitalization of warehousing, rising adoption of multimodal solutions, and the country's farm-to-port export orientation collectively underpin demand for dependable freight services. At the same time, carbon-reduction targets and new modal?shift incentives are triggering investment in rail and coastal shipping capacity, nudging the New Zealand freight and logistics market toward lower-emission transport mixes. Although the sector remains fragmented, recent high-profile mergers and rising automation capex signal the entrance of a more efficiency-driven competitive phase.

New Zealand Freight And Logistics Market Trends and Insights

Climate Resilience and Infrastructure Adaptation Initiatives Driving Growth

The National Adaptation Plan compels every large transport project to embed climate-risk criteria, elevating resilience from a design option to an approval prerequisite. Auckland's 2023 floods underscored the economic cost of route closures and port downtime, pushing private operators to invest in redundant capacity and elevated facility designs. Port of Tauranga has retrofitted

Scotts International. EU Vat number: PL 6772247784

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

www.scotts-international.com

cargo-handling areas with flood-resistant equipment, safeguarding berth productivity during storm surges. Insurance premiums on exposed assets are climbing, thereby incentivizing logistics firms to accelerate protective capital expenditure. The cumulative effect is a measurable improvement in network uptime and a shift toward asset-light contingency services able to route freight around climate-affected corridors.

Government's NZD 7 Billion (~USD 4.65 Billion) Transport Infrastructure in Pipeline

The 2025 Budget allocates NZD 6.8 billion (USD 4.3 billion) to logistics-relevant projects, including NZD 464 million (USD 293 million) earmarked for rail track renewal in the Auckland and Wellington corridors. Grade-separated highways under the Roads of National Significance program ease heavy-vehicle congestion, lowering operating costs and pushing payload efficiency higher. Integrated nodes such as the NZD 1.5 billion (USD 0.95 billion) Melling project bundle freight access and public-transport provisions into single schemes, shortening project lead times and amplifying network capacity. Collectively, the pipeline is expected to shave transit times on critical corridors by up to 15%, directly supporting New Zealand's freight and logistics market competitiveness. Private operators, encouraged by clearer forward workstreams, have accelerated fleet renewal, with a noticeable uptick in low-emission truck orders.

Geographic Isolation is Inflating Ocean Freight Costs

Being 1,800 km from its nearest major neighbor, New Zealand relies on ocean transport for 99% of trade by volume. Limited carrier competition and long transit times hardwire higher freight expenditure into supply chains, eroding margin headroom for exporters. New mega-alliances formed in 2025 now control around 80% of global container capacity, making rate volatility and capacity rollovers more acute for New Zealand shippers. Container imbalances linked to export-heavy flows further raise repositioning costs, while schedule recovery options remain scarce. The cumulative effect trims forecast growth for the New Zealand freight and logistics market by half a percentage point.

Other drivers and restraints analyzed in the detailed report include:

Diversification of Agri-Food Export Trade Lanes Witnessed Rapid Adoption of Warehouse Automation and Digital Freight Platforms
Driver Shortage and Aging Workforce Impacting Market Efficiency

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

Segment Analysis

Wholesale and retail trade contributed 33.45% of the New Zealand freight and logistics market size in 2025, reflecting the growing intricacy of omnichannel distribution networks and nationwide consumer penetration. E-commerce parcel counts surpassed 190 million in 2024 on NZ Post's network expansions, adding last-mile density and driving warehouse localization strategies. Inventory repositioning nearer to urban clusters improved order cycle times but increased the number of intra-city freight movements, elevating CEP demand. The food retail subset links directly to cold-chain investments, encouraging cross-segment collaborations in warehousing and refrigerated transport.

Manufacturing, albeit a smaller contributor in 2025, is expected to register the market's swiftest 3.95% CAGR expansion between 2026-2031. Government incentives for advanced manufacturing and value-added food processing are lifting the outbound tonnage of processed goods that command premium freight services. Automation in production lines mirrors warehouse digitization, requiring synchronized logistics scheduling to capture efficiency gains. Suppliers are adopting vendor-managed inventory programs, causing freight flows to become more predictable yet more time-sensitive. As policy shifts encourage higher local value capture, freight intensity per dollar of output is rising, deepening the sector's engagement with the New Zealand

Scotts International. EU Vat number: PL 6772247784

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

www.scotts-international.com

freight and logistics market.

Freight Transport retained 64.78% of New Zealand's freight and logistics market share in 2025, anchored by bulk movement of goods to ports and metropolitan distribution hubs. Price-sensitive exporters continue to rely on full-truckload and intermodal solutions that combine road and sea legs, benefiting operators capable of orchestrating integrated networks. Road-to-port shuttles remain the linchpin, yet modal diversification is gathering pace as carbon-pricing reorders cost hierarchies.

Courier, Express and Parcel activity, however, is expected to advance at 3.92% CAGR (2026-2031), absorbing surging B2C volumes and rising SME cross-border export transactions. Automated sorting hubs with hourly throughputs above 30,000 parcels exemplify the scale of investment now flowing into CEP infrastructure. Competitive differentiation revolves around delivery-time guarantees and real-time visibility dashboards, compelling incumbents to partner with digital platforms and fine-tune last-mile routing algorithms. The dual speed of freight growth is thereby reshaping the revenue mix for integrated logistics providers that straddle multiple service silos.

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

List of Companies Covered in this Report:

Cardinal Logistics Champion Freight (N.Z.), Ltd. CMA CGM Group (Including CEVA Logistics) DHL Group DSV A/S (Including DB Schenker) FedEx Freightways Group, Ltd. GVI Logistics, Ltd. Hellmann Worldwide Logistics, Ltd. HW Richardson Group Japan Post Co., Ltd. (Including Toll Group) K&S Group KiwiRail Holdings, Ltd. Kuehne+Nagel Linfox Pty, Ltd. (Owned by Fox Group) Mainfreight, Ltd. MOVE Logistics Group, Ltd. NYK Line (Yusen Logistics Global Management Co., Ltd.) NZ Post Online Distribution, Ltd. United Parcel Service of America, Inc. (UPS)

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

Scotts International. EU Vat number: PL 6772247784

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

www.scotts-international.com

- 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 Logistics Performance
- 4.12 Modal Share
- 4.13 Freight Pricing Trends
- 4.14 Freight Tonnage Trends
- 4.15 Infrastructure
- 4.16 Regulatory Framework (Road and Rail)
- 4.17 Regulatory Framework (Sea and Air)
- 4.18 Value Chain and Distribution Channel Analysis
- 4.19 Market Drivers
 - 4.19.1 Climate Resilience and Infrastructure Adaptation Initiatives Driving Growth
 - 4.19.2 Government's NZD 7 Billion (~USD 4.65 Billion) P.A. Transport Infrastructure in Pipeline
 - 4.19.3 Diversification of Agri-Food Export Trade Lanes Witnessed
 - 4.19.4 Rapid Adoption of Warehouse Automation and Digital Freight Platforms
 - 4.19.5 Cook Strait Resilience Push Driving Multimodal Growth
 - 4.19.6 Carbon-Pricing Accelerating Shift to Rail and Coastal Shipping
- 4.20 Market Restraints
 - 4.20.1 Geographic Isolation Inflating Ocean Freight Costs in New Zealand
 - 4.20.2 Driver Shortage and Ageing Workforce Impacting Market Efficiency
 - 4.20.3 Rising Insurance Premiums After Climate-Event Losses
 - 4.20.4 Volcanic and Seismic Disruption Risk to Key Logistics Hubs
- 4.21 Technology Innovations in the Market
- 4.22 Porter's Five Forces Analysis
 - 4.22.1 Threat of New Entrants
 - 4.22.2 Bargaining Power of Buyers
 - 4.22.3 Bargaining Power of Suppliers
 - 4.22.4 Threat of Substitutes
 - 4.22.5 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

Scotts International. EU Vat number: PL 6772247784

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

www.scotts-international.com

- 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 Cardinal Logistics
 - 6.4.2 Champion Freight (N.Z.), Ltd.
 - 6.4.3 CMA CGM Group (Including CEVA Logistics)
 - 6.4.4 DHL Group
 - 6.4.5 DSV A/S (Including DB Schenker)
 - 6.4.6 FedEx
 - 6.4.7 Freightways Group, Ltd.
 - 6.4.8 GVI Logistics, Ltd.
 - 6.4.9 Hellmann Worldwide Logistics, Ltd.
 - 6.4.10 HW Richardson Group
 - 6.4.11 Japan Post Co., Ltd. (Including Toll Group)
 - 6.4.12 K&S Group
 - 6.4.13 KiwiRail Holdings, Ltd.
 - 6.4.14 Kuehne+Nagel
 - 6.4.15 Linfox Pty, Ltd. (Owned by Fox Group)
 - 6.4.16 Mainfreight, Ltd.
 - 6.4.17 MOVE Logistics Group, Ltd.
 - 6.4.18 NYK Line (Yusen Logistics Global Management Co., Ltd.)
 - 6.4.19 NZ Post
 - 6.4.20 Online Distribution, Ltd.
 - 6.4.21 United Parcel Service of America, Inc. (UPS)

Scotts International. EU Vat number: PL 6772247784

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

www.scotts-international.com

7 Market Opportunities and Future Outlook
7.1 White-space and Unmet-need Assessment

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

Market Report | 2026-01-16 | 150 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"/>		
Company Name*	<input type="text"/>	EU Vat / Tax ID / NIP number*	<input type="text"/>
Address*	<input type="text"/>	City*	<input type="text"/>
Zip Code*	<input type="text"/>	Country*	<input type="text"/>
		Date	<input type="text" value="2026-03-01"/>
		Signature	

Scotts International. EU Vat number: PL 6772247784

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

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