

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

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Report description:

Canada Freight And Logistics Market Analysis

The Canada freight and logistics market was valued at USD 111.66 billion in 2025 and estimated to grow from USD 116.63 billion in 2026 to reach USD 145.05 billion by 2031, at a CAGR of 4.45% during the forecast period (2026-2031). Growth reflects steady cross-border trade under the Canada-United States-Mexico Agreement (CUSMA), deep federal infrastructure spending through the National Trade Corridors Fund, and an expanding e-commerce ecosystem that tightens last-mile service requirements. Railroad intermodal solutions gain traction as carbon-pricing frameworks encourage shippers to shift medium-haul moves away from trucks. Technology investments in automated sortation, IoT-enabled asset tracking, and predictive maintenance improve velocity across all modes. At the same time, a chronic driver shortage, seasonal rail congestion, and rising cybersecurity incidents create operational headwinds that logistics providers must offset through workforce initiatives, network redundancies, and tighter IT governance. These cross-currents keep the Canada freight and logistics market in a balanced yet dynamic expansion phase.

Canada Freight And Logistics Market Trends and Insights

E-commerce Boom Fuelling CEP Volumes

Rapid online retail adoption lifts parcel counts well above pre-pandemic baselines, giving CEP a projected 5.18% CAGR between 2025-2030, outpacing the broader Canada freight and logistics market. Higher de minimis thresholds under CUSMA remove duties on small inbound parcels, shrinking customs clearance costs and elevating cross-border volumes. Urban density stresses last-mile

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capacity, prompting new automated sortation hubs in the Greater Toronto Area and lower-emission curbside delivery pilots. Canada Post's 2025 labor stoppage accelerated share gains for private carriers, driving Purolator's acquisition of Livingston International to add customs-brokerage depth. Investment in redundant network capacity, parcel lockers, and micro-fulfillment centers mitigates service disruption risk. Together, these shifts cement CEP as the structural growth engine inside the Canada freight and logistics market.

Cross-border Trade Growth Under CUSMA

Modernized rules of origin and electronic documentation provisions simplify compliance, especially in automotive and aerospace supply chains that account for large bilateral freight flows. Manufacturers realign sourcing to meet the 75% North American content rule, boosting north-south shipments and supporting stable rail volumes through Windsor-Detroit and Emerson-Pembina gateways. CUSMA's tariff shields reduce pricing uncertainty versus Section 232 steel and aluminum penalties, encouraging longer-term transportation contracts. Yet the United States' proposals to trim de minimis privileges for Canadian exports inject compliance complexity for parcel shippers. Over time, data-driven brokerage platforms help small retailers adapt, preserving momentum within the Canada freight and logistics market.

Acute Driver Shortage and Ageing Workforce

Roughly 80,000 vacant seats in long-haul trucking diminish fleet utilization and inflate spot rates, placing a drag on GDP-linked freight flows. Average driver age climbs past 55, widening succession gaps as retirements outpace new entrants. Western oil-and-gas lanes endure the sharpest deficits, occasionally forcing drilling contractors to air-freight critical parts at high cost. Carrier initiatives include 15% wage hikes, signing bonuses, and expedited immigration programs, yet lifestyle concerns persist. Automation pilots for on-highway platooning and last-mile sidewalk robots showcase mitigation potential but remain several years from scale. The Canada freight and logistics market absorbs higher costs while exploring multi-modal offsets.

Other drivers and restraints analyzed in the detailed report include:

Federal Infrastructure Spending (NTCF, Port Expansions) Cold-chain Demand From Pharma and Food Rail-network Capacity Bottlenecks

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

Segment Analysis

Manufacturing generated 22.78% of 2025 revenue, sustained by auto assembly, aerospace components, and metals refining that require predictable, high-volume freight lanes. Yet Wholesale and Retail Trade's 4.70% CAGR between 2026-2031 highlights the momentum shift toward consumer-centric logistics. Structured inventory placement closer to demand centers trims delivery windows and fuels warehouse leasing in suburban nodes. The Canada freight and logistics market size tied to retail is rising alongside click-and-collect services that blur store and fulfillment roles.

CUSMA regional-content thresholds reconfigure auto supply chains, nudging stamping plants into Ontario and exporting sub-assemblies back to U.S. final assembly lines. For providers, compliance complexity demands deeper customs-brokerage integration, explaining UPS's USD 1.6 billion purchase of Andlauer Healthcare Group, which adds validated pharma transport capacity and high-margin specialty know-how. Together, these shifts prove that the Canada freight and logistics industry serves increasingly diverse sectoral needs, from heavy machinery to temperature-controlled biologics.

Freight Transport dominated 2025 with 60.88% Canada freight and logistics market share as bulk commodities, automobiles, and

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consumer goods move across a 9.9 million km² landscape. CEP's 5.06% CAGR between 2026-2031 more than doubles the expansion pace of Freight Transport, powered by urban e-commerce demands and omnichannel retail strategies. The Canada freight and logistics market size for CEP is projected to expand in lockstep with warehouse automation and real-time parcel visibility rollouts. Asset-heavy rail and trucking operators digitize dispatch and introduce predictive maintenance, but automated sortation equipment remains the hallmark of CEP operations.

Technology divergence reinforces differing cost curves: CEP firms pour capital into robotics and data analytics, whereas bulk transporters focus on fuel efficiency and network design. Cargojet's CAD 2.3 billion (USD 1.7 billion) renewal with DHL exemplifies targeted asset alignment with premium service lanes, enabling profitable exposure to global express flows. Overall, the evolution illustrates how the Canada freight and logistics industry must serve both bulk shippers and same-day parcel customers under one national network umbrella.

The Canada 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:

Air Tindi, Ltd. Algoma Central Corporation C.H. Robinson Canada Post Corporation (Including Purolator, Inc.) Canadian National Railway Company Canadian Pacific Kansas City (CPKC) Cargojet, Inc. Delmar International, Inc. DHL Group DSV A/S (Including DB Schenker) Expeditors International of Washington, Inc. FedEx Groupe Robert Kuehne+Nagel Lineage, Inc. Logistec Metro Supply Chain, Inc. Mullen Group Seaspan ULC TFI International, Inc. 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
 - 4.6 Economic Performance and Profile
 - 4.6.1 Trends in E-Commerce Industry
 - 4.6.2 Trends in Manufacturing Industry

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- 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
- 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 Fuelling CEP Volumes
 - 4.25.2 Cross-Border Trade Growth under CUSMA
 - 4.25.3 Federal Infrastructure Spending (NTCF, Port Expansions)
 - 4.25.4 Cold-Chain Demand from Pharma and Food
 - 4.25.5 Carbon-Pricing Driving Intermodal Optimisation
 - 4.25.6 Arctic Corridor Opening (Northern Sea Route)
- 4.26 Market Restraints
 - 4.26.1 Acute Driver Shortage and Ageing Workforce
 - 4.26.2 Rail-Network Capacity Bottlenecks
 - 4.26.3 Indigenous Consultation Delays on Projects
 - 4.26.4 Rising Cyber-Security Risks to 3PL IT Systems
- 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

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- 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 Air Tindi, Ltd.

6.4.2 Algoma Central Corporation

6.4.3 C.H. Robinson

6.4.4 Canada Post Corporation (Including Purolator, Inc.)

6.4.5 Canadian National Railway Company

6.4.6 Canadian Pacific Kansas City (CPKC)

6.4.7 Cargojet, Inc.

6.4.8 Delmar International, Inc.

6.4.9 DHL Group

6.4.10 DSV A/S (Including DB Schenker)

6.4.11 Expeditors International of Washington, Inc.

6.4.12 FedEx

6.4.13 Groupe Robert

6.4.14 Kuehne+Nagel

6.4.15 Lineage, Inc.

6.4.16 Logistec

6.4.17 Metro Supply Chain, Inc.

6.4.18 Mullen Group

6.4.19 Seaspan ULC

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6.4.20 TFI International, Inc.

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

7 Market Opportunities and Future Outlook

7.1 White-Space and Unmet-Need Assessment

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