

Digital Freight Forwarding - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2026 - 2031)

Market Report | 2026-02-09 | 120 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:

Digital Freight Forwarding Market Analysis

Digital Freight Forwarding Market size in 2026 is estimated at USD 49.43 billion, growing from 2025 value of USD 41.46 billion with 2031 projections showing USD 119.12 billion, growing at 19.23% CAGR over 2026-2031.

Rapid cross-border e-commerce adoption, regulatory mandates for paperless trade, and the spread of API-enabled carrier connectivity collectively propel growth as shippers pivot away from analog booking processes. Integrated, cloud-native platforms that fuse rate discovery, booking, customs, and real-time visibility now form the backbone of global trade orchestration. Asia-Pacific retains leadership because of deep export manufacturing hubs and government-backed SME digitization programs, while North America and Europe scale through early carrier API standardization and strict data accuracy rules. Competitive dynamics center on vertical integrations like the DSV-Schenker combination and on pure-play technology entrants harnessing AI for lane-level dynamic pricing. The result is structural margin compression for manual intermediaries and sustained investment in value-added digital services that raise switching costs for shippers.

Global Digital Freight Forwarding Market Trends and Insights

Rapid Growth of Cross-Border E-commerce

Cross-border retail transactions are forecast to surpass USD 8 trillion by 2027, maintaining a 9% CAGR as Southeast Asian sellers

Scotts International. EU Vat number: PL 6772247784

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

www.scotts-international.com

reach Western consumers without wholesalers. Shippers increasingly demand unified customs clearance, duty calculation, and last-mile traceability in one interface. Digital freight forwarding market platforms automate entry summary declarations required under the European Commission's ICS2 program, eliminating manual paperwork and cutting border clearance delays. Omnichannel retailers now expect freight tools that manage pallet-level B2B moves alongside parcel-level B2C deliveries under a single tracking ID. Platform operators that embed automated compliance and multi-carrier parcel routing gain competitive advantage over intermediaries reliant on spreadsheets or email.

Rising Adoption of Cloud-Based Freight Platforms

Cloud models account for 71% of deployments because on-premise Transportation Management Systems cannot connect to modern carrier APIs or provide sub-minute visibility across modes. Mid-market shippers embrace subscription pricing that scales with shipment volumes, in contrast to the heavy capex demanded by legacy software. Data-localization modules built for GDPR compliance accelerate European uptake as vendors offer in-region hosting and consent governance, positioning the digital freight forwarding market for steady penetration in regulated verticals. Pre-built connectors into leading ERP suites minimize IT effort, further lowering barriers for SMEs.

Data-Standards Fragmentation

Logistics data sets remain siloed because rail, truck, ocean, and air parties adopt incompatible EDI and API specifications. Shippers must still juggle multiple integrations, hurting end-to-end automation and enlarging IT budgets. Blockchain pilots demonstrate transparency potential yet stall at scale for lack of unified data dictionaries. Governments push voluntary frameworks, but adoption lags in emerging regions where connectivity and resources are limited. Without global consensus, digital freight forwarding market expansion continues, albeit with costly workarounds.

Other drivers and restraints analyzed in the detailed report include:

API-Enabled Carrier Connectivity AI-Driven Dynamic-Pricing Marketplaces Cyber-Security & Privacy Risks

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

Segment Analysis

Transportation Management contributed 58.45% of 2025 revenue, underscoring its role as the first stop for shippers entering the digital freight forwarding market. Automated lane-level routing and live rate discovery generate immediate ROI, encouraging adoption even among cost-conscious SMEs. AI load-balancing elevates truck revenue per mile and trims empty backhauls, while electronic Bills of Lading in ocean freight hasten cargo releases.

Value-added Services, from customs clearance to supply-chain financing, is the fastest-growing slice, advancing at a 13.85% CAGR. These offerings stick customers to platforms by embedding financial and compliance workflows. Warehouse Management integration gains importance as omnichannel retail requires tight coordination between inbound freight and fulfillment centers. The expansion of these adjacencies positions platforms to capture a larger share of shipper spend and insulate against pure rate-comparison commoditization.

Retail & E-commerce dominated demand at 35.42% in 2025, propelled by direct-to-consumer brand exports and flash-sale delivery promises. Shippers of apparel and consumer electronics prize the end-to-end visibility that digital freight forwarding market platforms deliver.

Scotts International. EU Vat number: PL 6772247784

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

www.scotts-international.com

Healthcare & Pharma is the breakout segment, on track for an 10.95% CAGR through 2031. Temperature-controlled cargo monitoring, serial-level traceability, and stringent audit trails demand specialized digital workflows. Investments such as DHL's USD 2.2 billion spend on healthcare networks amplify vendor focus on pharma compliance, differentiating platforms able to guarantee 2-8C lane integrity.

The Digital Freight Forwarding Market Report is Segmented by Function (Transportation Management, Warehouse Management, Value-Added Services), End-Users (Retail & E-Commerce, and More), Deployment Mode (Cloud, On-Premise), Firm Type (SMEs, Large Enterprises and Government Entities), and Geography (North America, South America, Asia-Pacific, Europe, Middle East and Africa). The Market Forecasts are Provided in Terms of Value (USD).

Geography Analysis

Asia-Pacific holds 39.55% of 2025 revenue and is set to expand at a 19.42% CAGR, reflecting dominant manufacturing exports and supportive public policy that subsidizes SME digitization. India's express logistics sector targets 10-12% annual growth with highway and airport upgrades quickening freight flows. The Asia-Pacific Trade Facilitation Report pegs average trade-cost cuts at 11% from digital documentation reforms, reinforcing adoption logic.

North America benefits from entrenched e-commerce ecosystems and early-stage API uniformity across truckload and parcel carriers. Federal Maritime Commission data-accuracy programs stimulate standardized event codes, aiding platform interoperability. Canada and Mexico ride USMCA nearshoring momentum, raising demand for automated border-clearance modules and bilingual interfaces.

Europe pushes paperless mandates via eFTI and ICS2, compelling shippers to digitize or lose market access. Germany gains from the DSV-Schenker merger's EUR 1 billion (USD 1.10 billion) digital enhancement budget, while Nordic countries pair platform adoption with green-logistics goals. Post-Brexit customs protocols in the United Kingdom intensify need for compliance automation, steering freight toward integrated service providers.

List of Companies Covered in this Report:

Flexport Twill (Maersk) Forto Cello Square InstaFreight Transporteca Kontainers Kuehne + Nagel International AG (KN Freight Net) Turvo iContainers DHL Group DSV (Shipa Freight / myDSV) Sennder Cargo.one CEVA Logistics Shypple Zencargo Cubic Boxnbiz Freightwalla

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

Scotts International. EU Vat number: PL 6772247784

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

www.scotts-international.com

- 4 Market Landscape
 - 4.1 Market Overview
 - 4.2 Market Drivers
 - 4.2.1 Rapid growth of cross-border e-commerce
 - 4.2.2 Rising adoption of cloud-based freight platforms
 - 4.2.3 API-enabled carrier connectivity
 - 4.2.4 AI-driven dynamic-pricing marketplaces
 - 4.2.5 EU eFTI regulation mandating digital documents
 - 4.2.6 Satellite-IoT route-optimisation tools
 - 4.3 Market Restraints
 - 4.3.1 Data-standards fragmentation
 - 4.3.2 Cyber-security and privacy risks
 - 4.3.3 Digital-skills talent gap
 - 4.3.4 Carrier direct-booking margin squeeze
 - 4.4 Value / Supply-Chain Analysis
 - 4.5 Regulatory Landscape
 - 4.6 Technological Outlook
 - 4.7 Investment Scenario Analysis
 - 4.8 Value-Proposition Benchmarking of E-Platforms
 - 4.9 Impact of Global Disruptions on Trade Flows
 - 4.10 Porter's Five Forces
 - 4.10.1 Bargaining Power of Suppliers
 - 4.10.2 Bargaining Power of Buyers
 - 4.10.3 Threat of New Entrants
 - 4.10.4 Threat of Substitutes
 - 4.10.5 Competitive Rivalry Intensity

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

- 5.1 By Function
 - 5.1.1 Transportation Management
 - 5.1.1.1 Land
 - 5.1.1.2 Sea
 - 5.1.1.3 Air
 - 5.1.2 Warehouse Management
 - 5.1.3 Value-added Services
- 5.2 By End-users
 - 5.2.1 Retail and E-commerce
 - 5.2.2 Manufacturing
 - 5.2.3 Healthcare and Pharma
 - 5.2.4 Automotive
 - 5.2.5 Others
- 5.3 By Deployment Mode
 - 5.3.1 Cloud
 - 5.3.2 On-premise
- 5.4 By Firm Type
 - 5.4.1 SMEs
 - 5.4.2 Large Enterprises and Government Entities

Scotts International. EU Vat number: PL 6772247784

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

www.scotts-international.com

5.5 By Geography

5.5.1 North America

5.5.1.1 United States

5.5.1.2 Canada

5.5.1.3 Mexico

5.5.2 South America

5.5.2.1 Brazil

5.5.2.2 Peru

5.5.2.3 Chile

5.5.2.4 Argentina

5.5.2.5 Rest of South America

5.5.3 Asia-Pacific

5.5.3.1 India

5.5.3.2 China

5.5.3.3 Japan

5.5.3.4 Australia

5.5.3.5 South Korea

5.5.3.6 South East Asia (Singapore, Malaysia, Thailand, Indonesia, Vietnam, and Philippines)

5.5.3.7 Rest of Asia-Pacific

5.5.4 Europe

5.5.4.1 United Kingdom

5.5.4.2 Germany

5.5.4.3 France

5.5.4.4 Spain

5.5.4.5 Italy

5.5.4.6 BENELUX (Belgium, Netherlands, and Luxembourg)

5.5.4.7 NORDICS (Denmark, Finland, Iceland, Norway, and Sweden)

5.5.4.8 Rest of Europe

5.5.5 Middle East and Africa

5.5.5.1 United Arab of Emirates

5.5.5.2 Saudi Arabia

5.5.5.3 South Africa

5.5.5.4 Nigeria

5.5.5.5 Rest of Middle East And Africa

6 Competitive Landscape

6.1 Market Concentration

6.2 Strategic Moves

6.3 Market Share Analysis

6.4 Company Profiles (includes Global level Overview, ... Recent Developments)

6.4.1 Flexport

6.4.2 Twill (Maersk)

6.4.3 Forto

6.4.4 Cello Square

6.4.5 InstaFreight

6.4.6 Transporteca

6.4.7 Kontainers

Scotts International. EU Vat number: PL 6772247784

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

www.scotts-international.com

6.4.8 Kuehne + Nagel International AG (KN Freight Net)

6.4.9 Turvo

6.4.10 iContainers

6.4.11 DHL Group

6.4.12 DSV (Shipa Freight / myDSV)

6.4.13 Sennder

6.4.14 Cargo.one

6.4.15 CEVA Logistics

6.4.16 Shyppl

6.4.17 Zencargo

6.4.18 Cubic

6.4.19 Boxnbiz

6.4.20 Freightwalla

7 Market Opportunities and Future Outlook

7.1 White-space and Unmet-Need Assessment

Scotts International. EU Vat number: PL 6772247784

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

www.scotts-international.com

**Digital Freight Forwarding - Market Share Analysis, Industry Trends & Statistics,
Growth Forecasts (2026 - 2031)**

Market Report | 2026-02-09 | 120 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="2026-02-26"/>
		Signature	

Scotts International. EU Vat number: PL 6772247784

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

www.scotts-international.com

