

United States FTL Freight Brokerage - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2026 - 2031)

Market Report | 2026-02-09 | 120 pages | Mordor Intelligence

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Report description:

United States FTL Freight Brokerage Market Analysis

The United States FTL Freight Brokerage Market was valued at USD 16.33 billion in 2025 and estimated to grow from USD 17.59 billion in 2026 to reach USD 25.51 billion by 2031, at a CAGR of 7.72% during the forecast period (2026-2031).

The scale and trajectory underscore how rapidly shippers are migrating procurement toward digital, third-party full-truckload specialists in response to e-commerce fulfillment imperatives, nearshoring, and infrastructure spending. Platform-driven intermediaries are consolidating volumes by integrating predictive pricing, API connectivity, and automated compliance checks that shrink manual touch points and shorten settlement cycles. At the same time, concentrated buying power allows top brokers to secure capacity despite an aging driver workforce, volatile diesel prices, and tightening credit. Technology leadership, deep carrier relationships, and diversified equipment portfolios therefore emerge as decisive advantages as supply chains digitize, cross-border traffic grows, and shippers pursue cost-out strategies through load consolidation.

United States FTL Freight Brokerage Market Trends and Insights

Explosive E-commerce Fulfillment Demand

Distributed inventory strategies require granular capacity management that traditional asset-based carriers cannot meet efficiently. Brokers using AI-driven consolidation engines reduce empty miles and compress transportation cycle times by up to

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35%, improving cost-to-serve for omnichannel retailers. Micro-fulfillment hubs in dense urban zones stimulate frequent, small-lot full-truckload moves that reward intermediaries capable of rapid capacity matching. Speed-to-customer remains paramount, enabling premium pricing on expedited multi-stop routes and reinforcing the US FTL freight brokerage market as a go-to partner for e-commerce networks.

Shippers' Cost-Out Agenda and Modal Shift to FTL

Manufacturers consolidating loads above 15,000 lb avoid terminal handling, lower damage claims, and cut transit times, realizing 12-18% savings versus comparable LTL routings. Automotive and industrial supply chains favor direct-to-plant deliveries to sustain just-in-time inventory disciplines. Brokers able to orchestrate regional consolidation hubs draw incremental volume as supply chain managers re-prioritize velocity over lowest unit cost, reinforcing volume flows into the US FTL freight brokerage market.

Chronic Driver Shortage and Aging Workforce

Non-payroll trucking employment shrank 16.3% in 2024, the sharpest retrenchment since 2009. Independent contractors face 20% higher insurance and financing costs, pushing some off the road. Drug and Alcohol Clearinghouse violations and potential ELD mandates on pre-2000 trucks trim further capacity. Brokers with dependable carrier pools can raise margins, yet overall volume headroom narrows, slowing expansion potential for the US FTL freight brokerage market.

Other drivers and restraints analyzed in the detailed report include:

Digitization and API-Driven Freight-Matching Platforms
US-Mexico Nearshoring Corridor Growth
Diesel-Price Volatility Compressing Broker Margins

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

Segment Analysis

Distributive trade accounted for 30.35% of the US FTL freight brokerage market share in 2025, reflecting omnichannel retailers, wholesalers, and e-commerce marketplaces that depend on nationwide dry-van networks. Growth remains stable as inventory decentralization favors frequent replenishment. Construction, accelerated by Infrastructure Investment and Jobs Act funding, registers the fastest 5.18% CAGR to 2031. Flatbed brokers coordinate rebar, prefabricated walls, and heavy equipment to thousands of work sites, capturing premium rates for specialized routings. Manufacturing and automotive continue to present cross-border opportunities as nearshoring drives synchronized flows between assembly plants and supplier parks. Oil, gas, and mining volumes fluctuate with commodity cycles, while agriculture, fishing, and forestry shipments retain seasonal predictability that brokers monetize through strategic positioning of capacity in harvest corridors.

The end-user mix supports margin diversification. A slowdown in consumer spending can be offset by infrastructure outlays that extend through 2029 appropriations. Brokers leveraging data analytics segment shippers by commodity volatility and adjust pricing strategies dynamically, sustaining profitability across cycles. FEMA-related episodic volume spikes provide additional upside. The balanced portfolio across end-users therefore underpins the long-run resilience of the US FTL freight brokerage market.

The US FTL Freight Brokerage Market Report is Segmented by End-User (Manufacturing and Automotive, Oil and Gas Mining and Quarrying, Agriculture Fishing and Forestry, Construction, Distributive Trade, and More), Equipment Type (Dry-Van, Refrigerated Reefer, Flatbed Heavy-Haul, Tanker Bulk, and More), Freight Type (General Freight, Refrigerated Freight), and Geography. The

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Market Forecasts are Provided in Terms of Value (USD).

List of Companies Covered in this Report:

C.H. Robinson J.B. Hunt Transport Services Total Quality Logistics Echo Global Logistics Landstar System RXO Schneider WWEX Group (Worldwide Express) GlobalTranz Arrive Logistics Hub Group Mode Global Armstrong Transport Group Nolan Transportation Group Trinity Logistics PLS Logistics Services Allen Lund Company Werner Enterprises Kag Logistics Inc Scotlynn

Additional Benefits:

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

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