

Air Freight Forwarding Market Size & Share Analysis - Growth Trends and Forecast (2026 - 2031)

> **Industry:** Freight Forwarding & Multimodal (Logistics & Supply Chain)
> **Source:** https://www.mordorintelligence.com/industry-reports/air-freight-forwarding-market
> **Scraped Date:** 2026-09-17

Executive Market Summary

Market Metric	Details
Base Market Size	USD 99.23 billion
Projected Forecast (2031)	USD 99.23 billion
Growth Rate (CAGR)	4.78 %
Largest Market Region	N/A
Fastest-Growing Region	N/A

Market Visualizations & Infographics

! [Major players in Air Freight Forwarding industry] (images/chart_2.png)

! [Air Freight Forwarding Market Size] (images/chart_3.png)

! [Air Freight Forwarding Market Share by Cargo Type, 2025] (images/chart_4.png)

! [Air Freight Forwarding Market Share by End-User Industry, 2025] (images/chart_5.png)

! [Air Freight Forwarding Market Growth Rate by Region] (images/chart_6.png)

! [Air Freight Forwarding Market Concentration] (images/chart_7.png)

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Comprehensive Research Analysis

Overview Points List Flex 49 Share Feature End

Market Overview

Study Period	2020 - 2031
Market Size (2026)	USD 99.23 Billion
Market Size (2031)	USD 125.34 Billion
Growth Rate (2026 - 2031)	4.78 %
Fastest Growing Market	Asia Pacific
Largest Market	Asia Pacific
Market Concentration	Medium

Major Players*Disclaimer: Major Players sorted in no particular order

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Market Overview

Air Freight Forwarding Market Analysis by Mordor IntelligenceThe Air Freight Forwarding Market size is expected to grow from USD 94.27 billion in 2025 to USD 99.23 billion in 2026 and is forecast to reach USD 125.34 billion by 2031 at 4.78% CAGR over 2026-2031.

This growth path balances fuel-cost volatility, carbon-compliance expenses, and slot scarcity at major hubs against structural tailwinds from cross-border e-commerce, temperature-controlled pharmaceutical logistics, and high-value semiconductor flows that continue to favor speed and reliability. Policy shifts are reshaping parcel routing and compliance, which raises the value of forwarders with global brokerage coverage and shipment-level visibility for customs and sustainability reporting. In healthcare, GDP-certified gateways, validated packaging, and continuous temperature monitoring support a higher-margin mix that cushions rate pressure in general freight. Semiconductor shipments tied to AI infrastructure spending sustain premium yields, with Asia-Pacific production hubs anchoring long-haul traffic into North America and Europe.

Key Report Takeaways

- * By cargo type, general cargo led with 62.15% market size of the air freight forwarding market size in 2025, while special cargo is forecast to expand at a 4.18% CAGR through 2031.
- * By destination, international routes accounted for 75.45% of market share in 2025 and are projected to grow at a 4.80% CAGR to 2031, outpacing domestic flows.
- * By end-user industry, e-commerce and retail held the largest share at 28.85% market share of the air freight forwarding market in 2025, and healthcare and pharmaceuticals show the fastest trajectory at a 4.82% CAGR through 2031.
- * By region, Asia-Pacific led with a 40.70% market share in 2025 and is forecast to expand at a 7.80% CAGR through 2031, the fastest among regions.

Key Market Trends

Global Air Freight Forwarding Market Trends and InsightsDrivers Impact Analysis*

Driver	(~) % Impact on CAGR Forecast	Geographic Relevance	Impact Timeline
E-commerce boom driving express air shipment demand	+1.2%	Global, with early gains in China-Europe corridors, Southeast Asia, and Latin America nearshoring routes	Medium term (2-4 years)
Time-critical pharmaceutical and biotech cold chain logistics	+0.9%	North America, Europe, India, with spill-over to emerging APAC and Middle East manufacturing hubs	Long term (≥ 4 years)
Growth in high-value electronics and semiconductor trade	+1.0%	APAC core (Taiwan, South Korea, China), with secondary flows to North America and Europe for AI infrastructure	Short term (≤ 2 years)
Expansion of dedicated freighter fleets and belly cargo capacity	+0.7%	Global, concentrated in Middle East carriers, Asia-Pacific operators, and European gateways	Medium term (2-4 years)
Nearshoring and regionalized supply chains bolster cross-border and intra-regional airflows	+0.6%	North America, especially U.S.-Mexico corridors, and intra-APAC production shifts	Medium term (2-4 years)
Digitalization of pricing, booking, and customs accelerates SME adoption	+0.5%	Global, with stronger uptake at major export gateways and across digitally enabled brokerage networks	Short term (≤ 2 years)

Competitive Landscape

Competitive Landscape

The market shows moderate consolidation at the top, with scale benefits in procurement, digital platforms, and controlled capacity underpinning service stability during peak periods and disruptions. DSV completed the acquisition of DB Schenker for EUR 14.3 billion (USD 16.82 billion), targeted DKK 9 billion (USD 1.41 billion) in annual opportunities by 2027, and expanded global reach, which set a benchmark for scale-driven integration within the air freight forwarding market.

Nippon Express' acquisition of CargoPartners and Yusen Logistics' acquisition of Movianto deepened sector specialization in Europe and enhanced healthcare logistics capacity integrated with global forwarding networks. Incumbents invested in dynamic pricing, visibility, and automation to speed quote-to-book and orchestrate multi-leg routings in real time for time-definite, regulated, and high-value cargo. These moves reinforce stickiness in complex verticals and support premium tiers that defend margins amid base-rate variability.

Tech-focused platforms accelerated direct connections with airlines and brokers to streamline small and medium enterprise bookings and provide transparent pricing in near real time. Airline cargo divisions expanded widebody and regional narrowbody networks that link production hubs to consumption centers, which sharpened competition for enterprise accounts on lanes where predictable lift is critical. Large forwarders increased charter programs and long-term leases to limit exposure to airline allocation cuts and stabilize service for premium customers during Q4 peaks and routing disruptions. The combination of scale, sector specialization, and controlled capacity is central to winning and retaining regulated customers whose products command higher yields and strict service metrics. These dynamics continue to define the air freight forwarding market as contracts that emphasize operational resilience and data transparency.

Sustainability requirements added a new layer to competitive differentiation, with forwarders offering green service tiers that include SAF contributions and shipment-level emissions reporting aligned with corporate climate targets. Kintetsu World Express executed SAF agreements to help reduce Scope 3 emissions in cooperation with airline partners, while expanding its CEIV Pharma footprint to serve high-growth healthcare corridors. DHL launched a dedicated B777 pharma freighter and scaled its health logistics investment to build capacity and control on critical lanes. As regulations expand across regions and stakeholders seek measurable emissions reductions, operators that unify carbon accounting, routing, and capacity planning may retain a durable advantage in bids and renewals. These shifts continue to shape the air freight forwarding market's path through 2026 and beyond as shippers evaluate partners on reliability, visibility, and verified sustainability outcomes.

Air Freight Forwarding Industry Leaders* DHL Supply Chain & Global Forwarding

* Kuehne + Nagel

* DSV

* UPS Supply Chain Solutions

* Expeditors International

* *Disclaimer: Major Players sorted in no particular order

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Global Air Freight Forwarding Market Report ScopeThe Air Freight Forwarding Market Report is Segmented by Cargo Type (General Cargo, Special Cargo, and Others), by Destination (International, Domestic), by End-User Industry (E-Commerce & Retail, Manufacturing & Automotive, Healthcare & Pharmaceuticals, Perishables & Fresh Produce, and More), and by Geography (North America, South America, Asia-Pacific, and More). The Market Forecasts are Provided in Terms of Value (USD).

By Cargo TypeGeneral Cargo |
Special Cargo and Others |

Segmentation Accordion Item

By GeographyNorth America | United States |
| Canada |
| Mexico |
South America | Brazil |
| Peru |
| Chile |
| Argentina |
| Rest of South America |
Asia-Pacific | India |
| China |
| Japan |
| Australia |
| South Korea |
| South East Asia (Singapore, Malaysia, Thailand, Indonesia, Vietnam, and Philippines) |
| Rest of Asia-Pacific |
Europe | United Kingdom |
| Germany |
| France |
| Spain |
| Italy |
| BENELUX (Belgium, Netherlands, and Luxembourg) |
| NORDICS (Denmark, Finland, Iceland, Norway, and Sweden) |
| Rest of Europe |
Middle East and Africa | United Arab of Emirates |
| Saudi Arabia |
| South Africa |
| Nigeria |
| Rest of Middle East And Africa |

Frequently Asked Questions

What is the current size and growth outlook for the air freight forwarding market?

The air freight forwarding market size was USD 95.27 billion in 2025 and is forecast to reach USD 126.55 billion by 2031 at a 4.06% CAGR.

Which cargo type is expanding the fastest within air forwarding?

Special cargo is the fastest-growing category with a 4.18% CAGR through 2031, supported by pharma cold chains, lithium batteries, and aerospace components.

How are policy changes affecting cross-border e-commerce flows?

The United States suspension of de minimis for China-origin shipments in 2025 and EU proposals to remove low-value thresholds are shifting routing toward Europe and rewarding forwarders with strong digital customs capabilities.

Which region leads and which grows fastest in air freight forwarding?

Asia-Pacific leads with 40.70% share in 2025 and is also the fastest-growing at 7.80% CAGR through 2031, driven by semiconductors and expanding pharma exports.

What regulations are most influencing costs in 2026?

EU ETS removal of free allowances and ReFuelEU SAF blending requirements increased carbon-related costs on EU departures, which carriers have passed through to shippers and forwarders.

Where are leading forwarders investing for resilience and growth?

Investments focus on pharma-dedicated capacity and facilities, controlled freighter lift and charters, and digital platforms for pricing, visibility, and shipment-level emissions reporting.