

Digital 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/digital-freight-forwarding-market
> **Scraped Date:** 2026-09-17

Executive Market Summary

Market Metric	Details
Base Market Size	USD 51.43 billion
Projected Forecast (2031)	USD 51.43 billion
Growth Rate (CAGR)	18.09 %
Largest Market Region	N/A
Fastest-Growing Region	N/A

Market Visualizations & Infographics

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

! [Digital Freight Forwarding Market Summary] (images/chart_3.png)

! [Digital Freight Forwarding Market: Market Share by Function Type] (images/chart_4.png)

! [Digital Freight Forwarding Market: Market Share by Deployment Mode] (images/chart_5.png)

! [Digital Freight Forwarding Market CAGR (%), Growth Rate by Region] (images/chart_6.png)

! [Digital Freight Forwarding Market] (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 51.43 Billion
|

Market Size (2031)
|

USD 118.12 Billion
|

Growth Rate (2026 - 2031)
|

18.09 %
|

Fastest Growing Market
|

Asia Pacific
|

Largest Market
|
Asia Pacific
|

Market Concentration
|
Low
|

Major Players

*Disclaimer: Major Players sorted in no particular order

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Market Overview

Digital Freight Forwarding Market Analysis by Mordor Intelligence

The Digital Freight Forwarding Market size is expected to increase from USD 42.46 billion in 2025 to USD 51.43 billion in 2026 and reach USD 118.12 billion by 2031, growing at a CAGR of 18.09% over 2026-2031.

Demand is moving toward platforms that solve visibility, documentation, and compliance gaps rather than pure mode switching, and that shift favors providers that automate workflows across booking, tracking, and customs. Small and mid-sized enterprises are accelerating adoption because subscription software and pooled capacity overturn scale disadvantages in pricing and process control. Regional momentum is strongest in Asia-Pacific, where infrastructure programs and multi-modal corridors create network effects for digital orchestration, while North America and Europe advance through nearshoring, intermodal hubs, and regulatory digitization. Functional differentiation is concentrated in value-added layers such as customs, sustainability reporting, and trade finance, which turn compliance into a repeatable service that complements transportation execution.

Key Report Takeaways

- * By function, Transportation Management dominated the digital freight forwarding market share with 59.34% revenue in 2025, while Value-Added Services is projected to expand at a 16.21% CAGR through 2026-2031.
- * By end-users, Retail and E-commerce accounted for a 35.64% share in 2025, reinforcing their strong position in the Digital Freight Forwarding Market Size.
- * By deployment mode, Cloud captured 70.43% share in 2025, while On-Premise is set to record a 19.23% CAGR through 2026-2031.
- * By firm type, SMEs held a 60.27% share in 2025 and are projected to grow at a robust 17.45% CAGR from 2026 to 2031.
- * By geography, Asia-Pacific led with 40.24% share in 2025 and is the fastest growing region at a 19.48% CAGR through 2026-2031.

Key Market Trends

Market Trends and Insights

Drivers Impact Analysis of Digital Freight Forwarding Market*

Driver |
(~) % Impact on CAGR Forecast |
Geographic Relevance |
Impact Timeline |

Increasing demand for real-time visibility and tracking

|

+3.2%
|

Global, strongest in North America and EU

Medium term (2-4 years)

Post-pandemic contactless logistics operations

|

+2.8%

Global core, residual gains in Southeast Asia and Latin America

Short term (≤ 2 years)

Blockchain-enabled transparency solutions

|

+2.5%
|

North America, EU, and tier-1 APAC markets
|

Long term (≥ 4 years)
|

Sustainability mandates and carbon reporting

|

+3.5%
|

EU leadership with spillover to North America and select APAC
|

Medium term (2-4 years)
|

Integration with multi-modal networks

|

+3.1%
|

Central Asia corridors, APAC-Europe lanes, North American intermodal hubs

|

Medium term (2-4 years)

|

Rising SME adoption of digital platforms

|

+2.9%

|

Global, led by EU, South Africa, and Vietnam

|

Short term (≤ 2 years)

|

Source: Mordor Intelligence

|

Competitive Landscape

Competitive Landscape

Competition features digital-native platforms that emphasize algorithmic pricing, API connectivity, and automation alongside incumbents that leverage global networks and relationships to retain high-complexity cargo. Platform-led differentiation centers on real-time visibility, automated customer workflows, and embedded compliance that improve service predictability and decrease manual exceptions. This split encourages hybrid models where incumbents invest in modular software and automation to match digital peers in everyday execution quality.

Evidence of platform scaling also appears in captive and partner-led ecosystems. Samsung SDS reported Cello Square subscriber growth to 24,625 companies across 36 countries in 2025 alongside strong platform revenue, underscoring how embedded demand can accelerate third-party expansion when capabilities meet market needs.^[2] Samsung SDS, “Samsung SDS Financial Results,” Samsung SDS, [samsungds.com](https://www.samsungds.com) Select road-freight consolidators such as Sennder increased European scale by acquiring a large surface-transport operation in 2024, which reflects ongoing efforts to aggregate fragmented capacity in key lanes. These moves align with customer requirements for consistent coverage, standardized data, and unified service across borders.

Technology partnerships remain a core lever for speed and scale. Collaborative announcements in 2026 included managed transportation platforms that integrate real-time visibility and AI-driven workflows to improve planning and response, which is aligned with customer priorities across sectors.^[3] Turvo, “Collaborative Transportation Management Enhances Supply Chains,” Turvo, [turvo.com](https://www.turvo.com) In parallel, leading carriers and integrators publish logistics insights that highlight the value of multi-carrier and intermodal orchestration, signaling continued demand for digital coordination across extended networks. Over the forecast horizon, the Digital Freight Forwarding market will reward participants who pair process reliability with configurable tools for compliance, emissions, and analytics at the shipment level.

Digital Freight Forwarding Industry Leaders

*

Flexport

*

Twill (Maersk)

*

Forto

*

Cello Square

*

InstaFreight

*

*Disclaimer: Major Players sorted in no particular order

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Component Component 3 Scope Of The Report Bottom

Global Digital Freight Forwarding Market Report Scope

Digital Freight Forwarding Market report provides insights on the market like Market Overview, Market Dynamics, Value Chain / Supply Chain Analysis, Investment Scenarios, Government Regulations and Initiatives, Technology Development in Online Freight Forwarding and Digital Platforms, Overview on E-commerce Logistics and Freight Forwarding, Value Propositions of E-platforms Vs Competitors and Industry Attractiveness - Porter's Five Forces Analysis. The report also covers geopolitical impact analysis on the market.

Furthermore, the report also provides company profiles with leading market players to understand the competitive landscape of the market.

By Function

Transportation Management
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Land
|

|

Sea

|

|

Air

|

Warehouse Management

|

Value-added Services

|

Segmentation Accordion Item

By Geography

North America

|

United States

|

|

Canada

|

|

Mexico

|

South America

|

Brazil

|

|

Peru

|

|

Chile
|

|

Argentina
|

|

Rest of South America
|

Asia-Pacific
|

India
|

|

China
|

|

Japan

|

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Australia

|

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South Korea

|

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

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Rest of Asia-Pacific

|

Europe

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United Kingdom

|

|

Germany

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France

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|

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
|

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Saudi Arabia
|

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South Africa
|

|

Nigeria
|

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Rest of Middle East And Africa

Frequently Asked Questions

What is the current size and growth outlook for the Digital Freight Forwarding market?

The Digital Freight Forwarding market size reached USD 42.46 billion in 2025 and is projected to reach USD 118.12 billion by 2031 at an 18.09% CAGR. These figures reflect strong adoption of platform-led orchestration and compliance-centric services.

Which regions are leading and growing fastest in Digital Freight Forwarding?

Asia-Pacific leads with 40.24% share in 2025 and is the fastest growing region at a 19.48% CAGR, supported by infrastructure programs and multi-modal corridors. North America and Europe also grow through intermodal upgrades and regulatory digitization.

Which customer segments are shaping demand most in Digital Freight Forwarding?

Retail and E-commerce accounts for 35.64% of 2025 demand, while Healthcare and Pharma shows the fastest expansion at an 11.12% CAGR due to cold chain needs and traceability requirements.

How are deployment choices evolving in Digital Freight Forwarding?

Cloud remains dominant with 70.43% share in 2025 due to scalability and faster rollout, while On-Premise is expanding at a 19.23% CAGR in regulated and latency-sensitive environments that require stronger data control.

What differentiates leading platforms in Digital Freight Forwarding?

Leaders integrate transportation execution with value-added services like customs, emissions reporting, and trade finance, and they offer unified visibility, API connectivity, and configurable compliance workflows that reduce exceptions and speed decisions.

Why are SMEs advancing faster than large enterprises in Digital Freight Forwarding?

SMEs benefit from subscription pricing, pooled capacity, and pre-built integrations that match large-enterprise capabilities without heavy capital budgets, which supports faster adoption and steady share gains within their lanes.