

Container Terminal Operations Market Size & Share Analysis - Growth Trends and Forecast (2026 - 2031)

> **Industry:** Maritime, Port & Container Operations (Logistics & Supply Chain)

> **Source:** <https://www.mordorintelligence.com/industry-reports/global-container-terminal-operations-market>

> **Scraped Date:** 2026-09-17

Executive Market Summary

Market Metric	Details
Base Market Size	USD 78.39 billion
Projected Forecast (2031)	USD 78.39 billion
Growth Rate (CAGR)	3.96 %
Largest Market Region	N/A
Fastest-Growing Region	N/A

Market Visualizations & Infographics

! [Major players in Container Terminal Operations industry](images/chart_2.png)

! [Container Terminal Operations Market Size](images/chart_3.png)

! [Container Terminal Operations Market Share by Service Type, 2025](images/chart_4.png)

! [Container Terminal Operations Market Share by Automation Level, 2025](images/chart_5.png)

! [Container Terminal Operations Market Concentration](images/chart_6.png)

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! [GPTW](images/chart_18.png)

Comprehensive Research Analysis

Overview Points List Flex 49 Share Feature End

Market Overview

Study Period	2020 - 2031
Market Size (2026)	USD 78.39 Billion
Market Size (2031)	USD 95.19 Billion
Growth Rate (2026 - 2031)	3.96 %
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

Container Terminal Operations Market Analysis by Mordor IntelligenceThe Container Terminal Operations Market size was valued at USD 75.40 billion in 2025 and estimated to grow from USD 78.39 billion in 2026 to reach USD 95.19 billion by 2031, at a CAGR of 3.96% during the forecast period (2026-2031).

Robust demand for trade-facilitating infrastructure, the arrival of container vessels above 18,000 TEU, and steady investment in digital automation underpin this trajectory. Stevedoring revenues remain dominant, but rapid growth is shifting toward transportation and value-added logistics as operators extend inland. Asia-Pacific retains leadership with 41% 2024 share, supported by 52 fully automated Chinese ports and continuing public investment Business-Standard. Consolidation is gathering pace as operators chase scale advantages, while ESG-linked financing is lowering capital costs for greener equipment Maersk.

Key Report Takeaways

- * By service, stevedoring led with 41.62% of container terminal operations market share in 2025; transportation services are projected to log the fastest 3.98% CAGR through 2031.
- * By ownership model, state-owned facilities held 50.55% share in 2025, whereas public-private partnerships are advancing at a 4.62% CAGR.
- * By automation level, manual terminals still accounted for 68.41% share in 2025, yet fully automated sites are expanding at a 4.02% CAGR.
- * By container type, general boxes commanded 60.44% share in 2025, while reefer throughput is forecast to accelerate at 4.29% CAGR.
- * Geographically, Asia-Pacific captured 40.72% share in 2025 and is on track for the fastest 4.52% CAGR to 2031.

Key Market Trends

Global Container Terminal Operations Market Trends and InsightsDrivers Impact Analysis*

Driver	% Impact on CAGR Forecast	Geographic Relevance	Impact Timeline
Surge in mega-vessel deployments ($\geq 18k$ TEU)	+0.8%	Global, with concentration in Asia-Pacific and Europe	Medium term (2-4 years)
Digitised supply-chain visibility demands from BCOs	+0.6%	Global, led by North America and Europe	Short term (≤ 2 years)
Government-led port capacity expansions	+0.9%	Asia-Pacific core, spill-over to MEA and South America	Long term (≥ 4 years)
Near-shoring fuelling intra-regional feeder volumes	+0.5%	North America, Europe, with emerging impact in Asia-Pacific	Medium term (2-4 years)
ESG-linked financing lowering cost of green terminal upgrades	+0.4%	Global, with early adoption in Europe and North America	Long term (≥ 4 years)
Emerging Arctic sea-route creating new hub requirements	+0.2%	Northern Europe, Russia, with connectivity to Asia-Pacific	Long term (≥ 4 years)

Source: Mordor Intelligence |

Competitive Landscape

Competitive Landscape

Global operators such as PSA International, APM Terminals, and Hutchison Ports collectively control more than half of world throughput, yielding moderate concen

tration. Scale unlocks procurement leverage, integrated TOS platforms, and cross-regional customer packages, but rising PPP concessions invite region-specific challenges. CMA CGM's purchase of Santos Brasil assets and AD Ports Group's African portfolio show how acquisitions extend network reach and market power.

Automation acts as a strategic moat: early adopters report 25% lower per-move labor costs and 15% higher crane productivity. Vendors like ZPMC and Kalmar partner with software specialists to deliver "terminal-as-a-service" models that bundle hardware, analytics, and maintenance under multiyear contracts. ESG mandates further stratify players; those able to tap green finance at discount rates can front-load electrification, reinforcing customer appeal.

Regulatory harmonization is progressing, with ISO 14001 and ISPS certifications becoming table stakes for major carrier calls. The convergence of technology, finance, and regulation is sharpening competitive boundaries and establishing new benchmarks in the container terminal operations market.

Container Terminal Operations Industry Leaders* APM Terminals (A. P. Moller-Maersk)

- * PSA International

- * Hutchison Ports

- * DP World

- * COSCO Shipping Ports

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

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Scope Methodology P Space

For this methodology, the market covers revenues earned from operating container terminals at seaports, including core activities like vessel-to-shore handling, yard operations, and related terminal-side services that support container flow through the port.

Scope exclusions: We exclude ocean freight services, inland trucking or rail line-haul outside the terminal, ship agency, and non-container bulk terminal operations.

Segmentation Container

- * By Service* Stevedoring (Vessel/Quay Ops)

- * Cargo Handling

- * Transportation

- * Other Services

- * By Ownership Model* State-Owned

- * Public-Private Partnership

- * Private / Independent

- * By Automation Level* Manual

- * Semi-Automated

- * Fully Automated

- * By Container Type* General

- * Reefer

- * OOG / Project

- * Dangerous Goods (DG)

- * By Geography* North 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 Philip
pines)
- * 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 2026 value of the container terminal operations market?

The market stands at USD 78.39 billion in 2026, supported by mega-vessel calls a
nd growing automation deployments.

How fast will global terminal revenues grow through 2031?

Revenues are projected to expand at a 3.96% CAGR, reaching USD 95.19 billion by
2031.

Which region leads current throughput?

Asia-Pacific accounts for 40.72% of 2025 volume, aided by extensive Chinese and
Southeast Asian capacity expansions.

Which service segment is growing quickest?

Transportation services tied to inland logistics are forecast for a 3.98% CAGR,
outpacing traditional stevedoring.

What share do automated terminals hold today?

Fully automated sites represent 31.59% of global facilities, but they are advanc
ing at 4.02% CAGR as capital costs fall.

How are ESG mandates influencing investment?

Access to lower-cost, sustainability-linked loans is accelerating electrification and green equipment adoption across major hubs.