On-demand Freight Transportation Market Size & Share Analysis - Growth Trends and Forecast (2026 - 2031)

> **Industry:** Express, CEP & Last-Mile Delivery (Logistics & Supply Chain)
> **Source:** https://www.mordorintelligence.com/industry-reports/on-demand-freight-transportation-market
> **Scraped Date:** 2026-09-17

Executive Market Summary

Market Metric	Details
Base Market Size	USD 143.78 billion
Projected Forecast (2031)	USD 143.78 billion
Growth Rate (CAGR)	15.74 %
Largest Market Region	N/A
Fastest-Growing Region	N/A

Market Visualizations & Infographics

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![Major players in On-demand Freight Transportation industry](images/chart_2.png)

![On-demand Freight Transportation Market Size](images/chart_3.png)

![On-demand Freight Transportation Market Share by Service Type, 2025](images/chart_4.png)

![On-demand Freight Transportation Market Share by Delivery Speed, 2025](images/chart_5.png)

![On-demand Freight Transportation Market Growth Rate by Region](images/chart_6.png)

![On-demand Freight Transportation Market Concentration](images/chart_7.png)

![Icon](images/chart_8.png)

![footer background image](images/chart_10.png)

![Mordor Intelligence on Facebook](images/chart_12.svg)

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![Mordor Intelligence on Instagram](images/chart_15.svg)

![ESOMAR](images/chart_17.png)

![GPTW](images/chart_19.png)
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Comprehensive Research Analysis

Overview Points List Flex 49 Share Feature End

Market OverviewStudy Period | 2020 - 2031 |
Market Size (2026) | USD 143.78 Billion |
Market Size (2031) | USD 298.55 Billion |
Growth Rate (2026 - 2031) | 15.74 % |
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

On-demand Freight Transportation Market Analysis by Mordor IntelligenceThe On-demand Freight Transportation Market size is expected to increase from USD 123.14 billion in 2025 to USD 143.78 billion in 2026 and reach USD 298.55 billion by 2031, growing at a CAGR of 15.74% over 2026-2031.

Strong reshoring momentum compresses supply chains geographically, prompting shippers to favor flexible capacity they can activate in hours rather than weeks. Digital brokerage platforms deepen spot-market liquidity, allowing enterprise traffic that once moved under annual contracts to clear through real-time auctions that shave 5-7 percentage points off traditional broker margins. Infrastructure bills in major economies earmark billions of public dollars for corridor digitalization, which lowers asset dwell times and strengthens the commercial case for data-driven freight orchestration. Finally, temperature-controlled healthcare, fresh food, and semiconductor loads reinforce long-haul air and premium road demand, offsetting cost pressures from labor shortages and rising insurance premiums.

Key Report Takeaways* By service type, on-demand last-mile freight led with 45.59% of the on-demand freight transportation market share in 2025, while digital freight brokerage platforms are forecast to grow at a 19.91% CAGR through 2031.
* By mode of transport, road services commanded 64.25% share of the on-demand freight transportation market size in 2025, and air freight is projected to expand at an 18.42% CAGR through 2031.
* By delivery speed, standard 3-5 day services accounted for 38.43% share of the on-demand freight transportation market in 2025, whereas same-day delivery is advancing at a 19.21% CAGR to 2031.
* By end-user industry, e-commerce and retail held 26.03% of the on-demand freight transportation market in 2025, yet healthcare and pharma record the highest forecast growth at 19.63% CAGR.
* By geography, Asia-Pacific captured 41.74% of the on-demand freight transportation market in 2025 and is expected to grow at an 18.15% CAGR between 2026 and 2031.

Key Market Trends

Market Trends and InsightsDrivers Impact Analysis of On-demand Freight Transportation Market*

Drivers	(~) % Impact on CAGR Forecast	Geographic Relevance	Impact Timeline
Nearshoring of manufacturing boosting short-haul and cross-border truckload demand	+3.1%	North America (Mexico corridor), ASEAN core	Long term (≥ 4 years)
B2B freight-procurement platforms mainstreaming spot capacity access	+2.9%	Global, led by North America and the EU	Medium term (2-4 years)
Exploding demand for temperature-controlled pharma and fresh food on-demand services	+2.4%	Global, concentrated in developed markets	Medium term (2-4 years)
Government-backed supply-chain resilience funds expanding digital freight corridors	+2.2%	North America, EU, India	Long term (≥ 4 years)
Blockchain-enabled smart contracts shrinking carrier payment cycles	+1.6%	Global, early adoption in North America	Short term (≤ 2 years)
Quantum-inspired route optimization lifting trailer utilisation by more than 8 %	+1.3%	Global, dense corridors	Medium term (2-4 years)

Source: Mordor Intelligence |

Competitive Landscape

Competitive Landscape

The on-demand freight transportation market exhibits moderate fragmentation. Global technology players charge 8-12% transaction fees for matching while minimizing capital risk, yet invest heavily in patented optimization engines; XPO Logistics alone holds several key patents in routing and pricing. Asset-based incumbents react by spinning off pure-play brokerages witness RXO's recent separation to unlock valuation premiums and pursue tech-first growth. Mergers such as Korber's pending acquisition of MercuryGate underline consolidation around end-to-end execution suites that blend warehouse, transportation, and visibility modules.

Payment velocity emerges as a new battleground. Schneider FreightPower and similar blockchain wallets settle within 24 hours, cutting working-capital drag for small carriers and swelling loyal capacity pools. Meanwhile, autonomous trucking pilots such as Uber Freight and Aurora on the Dallas-Houston lane aim to remove driver constraints in high-volume corridors. Early adopters expect 15-20% lower cost per mile on mature runs, compelling rivals to form AV partnerships or risk margin erosion.

Specialization presents a parallel path. DHL Supply Chain's EUR 2 billion (USD 2.33 billion) global temperature-controlled build-out and UPS Healthcare's USD 500 million cold-chain expansion target regulated lanes with entry barriers where commoditized spot rates cannot easily compress margin. Platforms that certify for GDP, HazMat, or high-value cargo secure pricing power, while generalist marketplaces face dilution as new entrants bid down transaction fees. All told, competitive intensity rises, but superior technology stacks, vertical focus, and payment innovation differentiate leaders in the on-demand freight transportation market.

On-demand Freight Transportation Industry Leaders* Uber Freight

* C.H. Robinson Worldwide

* J.B. Hunt 360

* Flexport Inc.

* XPO Logistics

* *Disclaimer: Major Players sorted in no particular order

Component Component 3 Scope Of The Report Bottom

Global On-demand Freight Transportation Market Report ScopeBy Service TypeDigital Freight Brokerage / Matching |
On-demand Last-mile Freight |
Crowd-sourced Delivery Platforms |
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
	Southeast 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 Emirates
	Saudi Arabia
	South Africa
	Nigeria
	Rest of Middle East And Africa

Frequently Asked Questions

How fast is digital freight brokerage growing within on-demand freight?

Digital brokerage revenue is forecast to climb at a 19.91% CAGR between 2026-2031, significantly outpacing other service types.

Which region contributes the most volume to on-demand freight?

Asia-Pacific held 41.74% of global revenue in 2025 and is projected to remain the largest contributor through 2031.

Why is air freight gaining share despite higher costs?

Pharmaceutical cold-chain and urgent e-commerce shipments are driving 18.42% annual growth in on-demand air services, offsetting cost premiums through speed-to-market gains.

What limits electric truck adoption for on-demand transport?

Typical 150-250 mile ranges and hour-long charging dwell times reduce daily utilization by up to 15%, confining electric rigs to short-haul routes for now.

How do blockchain smart contracts benefit small carriers?

They release payment within a week of delivery, eliminating 2-3% factoring fees and improving working capital by 200-300 basis points.

Which end-user vertical is expanding fastest?

Healthcare and pharmaceuticals are growing at 19.63% CAGR due to strict temperature-control and traceability requirements.