

# Global Freight Forwarder Supply, Demand and Key Producers, 2026-2032

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## Abstracts

The global Freight Forwarder market size is expected to reach \$ 15480 million by 2032, rising at a market growth of 8.7% CAGR during the forecast period (2026-2032).

Freight Forwarder refers to an intermediary service provider that organizes and coordinates the movement of cargo from the shipper's point of origin to the consignee's destination through ocean, air, road, rail, or multimodal transportation. A Freight Forwarder typically arranges carrier capacity, route planning, cargo consolidation, documentation, customs coordination, insurance, warehousing interfaces, shipment tracking, and delivery management without necessarily operating the principal transport assets. Core service parameters include transportation mode, origin and destination coverage, transit time, cargo volume or weight, service reliability, shipment frequency, handling requirements, customs complexity, visibility, and delivery service level. The Freight Forwarder market covers port-to-port, door-to-port, port-to-door, and door-to-door services for general cargo, temperature-controlled goods, dangerous goods, oversized project cargo, high-value shipments, and time-critical freight. Its downstream customer base spans retail and e-commerce, automotive, electronics, industrial manufacturing, healthcare, food and beverage, chemicals, energy, aerospace, fashion, agriculture, and infrastructure-related industries.

## Key Findings

Freight Forwarder services coordinate cargo movement across ocean, air, road, rail, and multimodal transport networks

Ocean freight serves cost-sensitive volumes while air freight addresses high-

value and time-critical cargo requirements

Door-to-door and multimodal solutions increasingly integrate transportation, customs, warehousing, visibility, and last-mile delivery

Digital quotation, booking, documentation, tracking, and analytics are becoming standard components of Freight Forwarder services

Service reliability, network coverage, cargo expertise, and carrier capacity access remain major customer-selection criteria

## Market Trends

The Freight Forwarder market is evolving from transaction-based transportation brokerage toward digitally managed, multimodal, and industry-specific supply chain coordination. Customers increasingly expect a single service interface covering quotation, carrier booking, shipment documentation, customs processes, tracking, exception management, carbon information, and delivery confirmation. Freight Forwarder companies are therefore investing in customer portals, transport management systems, data analytics, application programming interfaces, and automated document workflows. Multimodal services combining ocean, air, road, and rail are gaining importance as shippers balance cost, transit time, resilience, and environmental performance. The market is also moving toward vertical specialization, with dedicated service frameworks for pharmaceuticals, semiconductors, automotive components, perishables, dangerous goods, aerospace cargo, and industrial projects. At the operational level, service providers are increasing the use of consolidation hubs, controlled capacity arrangements, alternative routings, and predictive exception management. The longer-term direction is toward a more connected Freight Forwarder platform model in which physical transportation coordination is supported by standardized data, interoperable systems, real-time visibility, and proactive supply chain decisions rather than manual shipment administration alone.

## Market Dynamics

### Drivers

The Freight Forwarder market is primarily driven by international trade, geographically

dispersed manufacturing, cross-border e-commerce, outsourced logistics management, and the increasing complexity of global supply chains. Many shippers purchase transportation from multiple ocean carriers, airlines, trucking companies, rail operators, customs brokers, warehouses, and last-mile providers, creating demand for an intermediary capable of coordinating these parties through a unified operating process. Freight Forwarder services also help smaller and medium-sized shippers access consolidated cargo capacity, international routes, documentation expertise, and local destination support that would be difficult to establish independently. Demand becomes particularly strong when supply chains require multiple countries, transport modes, border procedures, or time-sensitive delivery commitments. As companies seek to reduce internal logistics administration and improve shipment visibility, Freight Forwarder providers increasingly function as outsourced transportation-management partners rather than simple booking agents.

## Restraints

Market development is constrained by freight-rate volatility, limited carrier capacity during peak periods, fuel and surcharge fluctuations, port congestion, customs delays, geopolitical disruption, and dependence on third-party transportation assets. A Freight Forwarder may control shipment planning and customer communication but remains exposed to airline schedules, vessel reliability, trucking availability, rail capacity, terminal productivity, and regulatory decisions. The business also operates with significant working-capital requirements because freight charges, duties, and carrier payments may be incurred before customer settlement. Competitive bidding can compress gross profit per shipment, particularly for standardized general cargo where customers compare providers primarily by price. Service providers must additionally maintain compliance with customs, sanctions, dangerous-goods, trade-control, security, and data-protection requirements across multiple jurisdictions. Smaller Freight Forwarder companies may face difficulty investing in global information systems, cybersecurity, cargo insurance, certified handling facilities, and international offices while maintaining competitive rates.

## Opportunities

Market opportunities are expanding in cross-border e-commerce, pharmaceutical cold chains, semiconductor logistics, renewable-energy projects, aerospace components, temperature-sensitive food, dangerous goods, and emergency transportation. These segments require more than basic carrier booking and create value for Freight

Forwarder providers with specialized personnel, validated operating procedures, controlled facilities, secure handling, and shipment-level monitoring. Rail and sea-air solutions offer additional opportunities by creating service levels between conventional ocean and premium air freight. Digital platforms can also broaden access to small and medium-sized customers through faster quotation, simplified booking, electronic documentation, and centralized visibility. Another opportunity lies in supply chain consulting, where Freight Forwarder companies help customers redesign transport modes, inventory positioning, consolidation strategies, customs flows, and contingency routes. Providers with strong local execution and international network coordination can capture demand from companies diversifying manufacturing and sourcing across several countries rather than relying on a single production base.

## Challenges

The Freight Forwarder industry must manage a constant trade-off between competitive pricing, service reliability, operational control, and customer responsiveness. Shipment execution often involves parties using different information systems, documentation formats, data standards, and operating procedures, making interoperability and data quality persistent challenges. Providers must identify disruptions early, secure alternative capacity, communicate delays, and protect customer cargo even when the underlying problem originates with a carrier, terminal, border agency, or subcontractor. Recruiting and retaining personnel with expertise in customs, dangerous goods, project cargo, temperature control, and international trade remains important because technology cannot fully replace local regulatory and operational knowledge.

Cybersecurity has also become a material risk as quotations, bookings, commercial documents, customer data, and shipment instructions move through connected platforms. Long-term competitiveness requires both global process standardization and local flexibility, which can be difficult to maintain during rapid expansion, acquisitions, network integration, or periods of severe market volatility.

## Value Chain Analysis

The upstream portion of the Freight Forwarder value chain consists of transportation capacity and logistics infrastructure supplied by ocean carriers, airlines, trucking companies, rail operators, inland waterway providers, airports, ports, cargo terminals, container depots, warehouses, customs brokers, insurance companies, and information-technology providers. Freight Forwarder companies purchase, reserve, or coordinate these resources according to customer demand. Their cost structure is therefore heavily

influenced by carrier freight rates, space availability, fuel and security surcharges, terminal handling, documentation, customs services, warehousing, pickup and delivery, insurance, and information-system expenses. Providers with larger shipment volumes may obtain more favorable capacity access and procurement conditions, while specialized operators can generate value through technical knowledge and controlled handling rather than purchasing scale alone.

The midstream Freight Forwarder creates value through route design, carrier selection, cargo consolidation, shipment booking, export and import documentation, customs coordination, scheduling, tracking, exception management, and delivery control. Additional value may come from cargo insurance, purchase-order management, warehousing coordination, packaging, labeling, quality checks, and supply chain analytics. Downstream customers range from small exporters to multinational manufacturers and retailers. Revenue is commonly generated through the difference between purchased and sold freight rates, handling and documentation charges, customs-related fees, project-management fees, digital or visibility services, and specialized cargo premiums. Profitability depends on shipment volume, mode mix, trade-lane balance, procurement capability, operating efficiency, customer retention, cargo complexity, and the provider's ability to control exceptions without excessive manual cost.

## Segment Insights

By transportation mode, ocean freight forwarding handles large and less time-sensitive shipments through full-container-load, less-than-container-load, breakbulk, and specialized equipment arrangements. It provides comparatively economical unit transportation costs but is exposed to longer transit times, sailing schedules, port congestion, and container availability. Air freight forwarding serves urgent, lightweight, high-value, temperature-sensitive, or production-critical cargo and generally commands higher service revenue per kilogram. Road freight supports domestic, regional, first-mile, and last-mile movements, while rail freight provides an intermediate option for selected long-distance corridors. Multimodal Freight Forwarder services combine these modes to balance cost, speed, capacity, reliability, and emissions.

By service coverage, port-to-port forwarding centers on the international transportation leg and is most suitable for customers that manage origin and destination logistics independently. Door-to-door services integrate pickup, export clearance, main carriage, import procedures, and final delivery, creating higher coordination requirements and

greater revenue potential. By cargo handling requirements, general cargo represents the broadest service base, whereas temperature-controlled, dangerous, oversized, high-value, and time-critical shipments form specialized segments with higher operational barriers. Standard and consolidated services primarily compete on price and network frequency, while expedited, time-definite, and emergency services place greater emphasis on controlled capacity, rapid routing decisions, shipment visibility, and service recovery.

## **Downstream Market Opportunities**

Downstream opportunities vary significantly by industry. Retail and e-commerce customers require frequent shipments, inventory visibility, peak-season capacity, returns coordination, and rapid access to multiple consumer markets. Automotive and industrial manufacturers prioritize production continuity, inbound component scheduling, project cargo capability, and emergency transport. Electronics and semiconductor customers require secure handling, short transit times, and precise milestone visibility. Pharmaceutical and healthcare shippers place greater emphasis on temperature control, regulatory documentation, validated processes, and risk management. Food, agricultural, and perishable-goods customers require fast border processing and coordinated cold-chain capacity, while chemical and dangerous-goods shippers need certified packaging, documentation, segregation, and trained personnel. Energy, mining, infrastructure, and aerospace projects create opportunities for oversized cargo engineering, chartering, route surveys, heavy lifting, and site delivery. Freight Forwarder providers that combine industry expertise with multimodal capacity and local regulatory execution can obtain stronger customer relationships than providers offering standardized transport alone.

## **Regional Insights**

Europe is an important Freight Forwarder market and corporate base, supported by dense cross-border trade, integrated road networks, major air and ocean gateways, and strong demand for multimodal transportation. The region's market structure favors providers capable of coordinating road, short-sea, rail, air, and ocean services across multiple national customs and regulatory environments. North America has a large domestic road-freight base combined with substantial trans-Pacific, trans-Atlantic, and cross-border trade. Freight Forwarder demand in the region is shaped by port and airport gateways, Mexico and Canada trade flows, e-commerce, industrial production,

and the need to connect inland distribution networks with international transportation.

Asia Pacific is central to global Freight Forwarder activity because of its manufacturing concentration, export volumes, expanding consumer markets, and extensive ocean and air cargo networks. China, Japan, Southeast Asia, and major regional logistics hubs support significant demand for export forwarding, import distribution, intra-Asian trade, and multimodal transport. Emerging manufacturing diversification is creating additional trade lanes and increasing the importance of cross-border road, rail, and sea-air services. The Middle East acts as a connecting hub between Asia, Europe, and Africa and has opportunities in air cargo, sea-air logistics, energy projects, and regional distribution. Latin America and Africa offer longer-term potential associated with agricultural exports, mining, infrastructure, consumer imports, and improved trade connectivity, although customs complexity and infrastructure differences increase the importance of local execution capabilities.

## **Competitive Landscape Analysis**

The Freight Forwarder market is characterized by competition among large global logistics groups, multinational asset-light forwarding specialists, regional forwarders, customs-focused operators, digital platforms, and industry-specific logistics providers. Global companies compete through extensive office networks, carrier purchasing scale, multimodal services, customer technology platforms, contract logistics integration, and the ability to manage complex supply chains across numerous countries. Regional providers often differentiate through local carrier relationships, customs expertise, flexible customer service, and stronger knowledge of specific trade lanes. Specialized Freight Forwarder companies build competitive positions in pharmaceuticals, perishables, dangerous goods, aerospace, automotive, project cargo, or time-critical transportation, where compliance and execution capability are more important than network size alone. Industry consolidation continues to increase the scale of leading groups and expand geographic coverage, while digitalization reduces some traditional administrative barriers. Nevertheless, technology alone does not eliminate the need for physical capacity access, local operations, regulatory expertise, and disruption management. Competitive advantage increasingly depends on combining global procurement and standardized digital processes with responsive local service, specialized cargo expertise, reliable visibility, and the ability to provide alternative routing when normal transportation networks are disrupted.

## Report Scope

This report studies the global Freight Forwarder demand, key companies, and key regions.

This report is a detailed and comprehensive analysis of the world market for Freight Forwarder, and provides market size (US\$ million) and Year-over-Year (YoY) growth, considering 2025 as the base year. This report explores demand trends and competition, as well as details the characteristics of Freight Forwarder that contribute to its increasing demand across many markets.

## Highlights and key features of the study

Global Freight Forwarder total market, 2021-2032, (USD Million)

Global Freight Forwarder total market by region & country, CAGR, 2021-2032, (USD Million)

U.S. VS China: Freight Forwarder total market, key domestic companies, and share, (USD Million)

Global Freight Forwarder revenue by player, revenue and market share 2021-2026, (USD Million)

Global Freight Forwarder total market by Transportation Mode Types, CAGR, 2021-2032, (USD Million)

Global Freight Forwarder total market by Application, CAGR, 2021-2032, (USD Million)

This report profiles major players in the global Freight Forwarder market based on the following parameters - company overview, revenue, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include Kuehne + Nagel International AG, DHL Global Forwarding (DHL Group), DSV A/S, CEVA Logistics SA, GEODIS SA, Expeditors International of Washington, Inc., Nippon Express Co., Ltd. (NX Group), Kintetsu World Express, Inc.,

Yusen Logistics Co., Ltd., Sinotrans Limited, etc.

This report also provides key insights about market drivers, restraints, opportunities, new product launches or approvals.

Stakeholders would have ease in decision-making through various strategy matrices used in analyzing the world Freight Forwarder market

## **Detailed Segmentation:**

Each section contains quantitative market data including market by value (US\$ Millions), by player, by regions, by Transportation Mode Types, and by Application. Data is given for the years 2021-2032 by year with 2025 as the base year, 2026 as the estimate year, and 2027-2032 as the forecast year.

## **Global Freight Forwarder Market, By Region:**

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

## **Market Segmentation**

### **Global Freight Forwarder Market, Segmentation by Transportation**

*Global Freight Forwarder Supply, Demand and Key Producers, 2026-2032*

## **Mode Types:**

Ocean Freight Forwarding

Air Freight Forwarding

Road Freight Forwarding

Rail Freight Forwarding

Multimodal Freight Forwarding

## **Global Freight Forwarder Market, Segmentation by Service Coverage Types:**

Port-to-Port Freight Forwarding

Door-to-Port Freight Forwarding

Port-to-Door Freight Forwarding

Door-to-Door Freight Forwarding

## **Global Freight Forwarder Market, Segmentation by Cargo Handling Requirement Types:**

General Cargo Freight Forwarding

Temperature-controlled Freight Forwarding

Dangerous Goods Freight Forwarding

Project and Oversized Cargo Freight Forwarding

High-value and Time-critical Freight Forwarding

## **Global Freight Forwarder Market, Segmentation by Application:**

Retail and E-commerce

Automotive Industry

Consumer Electronics

Pharmaceuticals and Healthcare

Food and Beverage

Chemicals and Hazardous Materials

Others

## **Companies Profiled:**

Kuehne + Nagel International AG

DHL Global Forwarding (DHL Group)

DSV A/S

CEVA Logistics SA

GEODIS SA

Expeditors International of Washington, Inc.

Nippon Express Co., Ltd. (NX Group)

Kintetsu World Express, Inc.

Yusen Logistics Co., Ltd.

Sinotrans Limited

Hellmann Worldwide Logistics SE & Co. KG

Rhenus Group

DACHSER SE

C.H. Robinson Worldwide, Inc.

KLN Logistics Group Limited

## Key Questions Answered

1. How big is the global Freight Forwarder market?
2. What is the demand of the global Freight Forwarder market?
3. What is the year over year growth of the global Freight Forwarder market?
4. What is the total value of the global Freight Forwarder market?
5. Who are the Major Players in the global Freight Forwarder market?
6. What are the growth factors driving the market demand?

## Contents

### 1 SUPPLY SUMMARY

- 1.1 Freight Forwarder Introduction
- 1.2 World Freight Forwarder Market Size & Forecast (2021 & 2025 & 2032)
- 1.3 World Freight Forwarder Total Market by Region (by Headquarter Location)
  - 1.3.1 World Freight Forwarder Market Size by Region (2021-2032), (by Headquarter Location)
  - 1.3.2 United States Based Company Freight Forwarder Revenue (2021-2032)
  - 1.3.3 China Based Company Freight Forwarder Revenue (2021-2032)
  - 1.3.4 Europe Based Company Freight Forwarder Revenue (2021-2032)
  - 1.3.5 Japan Based Company Freight Forwarder Revenue (2021-2032)
  - 1.3.6 South Korea Based Company Freight Forwarder Revenue (2021-2032)
  - 1.3.7 ASEAN Based Company Freight Forwarder Revenue (2021-2032)
  - 1.3.8 India Based Company Freight Forwarder Revenue (2021-2032)
- 1.4 Market Drivers, Restraints and Trends
  - 1.4.1 Freight Forwarder Market Drivers
  - 1.4.2 Factors Affecting Demand
  - 1.4.3 Major Market Trends

### 2 DEMAND SUMMARY

- 2.1 World Freight Forwarder Consumption Value (2021-2032)
- 2.2 World Freight Forwarder Consumption Value by Region
  - 2.2.1 World Freight Forwarder Consumption Value by Region (2021-2026)
  - 2.2.2 World Freight Forwarder Consumption Value Forecast by Region (2027-2032)
- 2.3 United States Freight Forwarder Consumption Value (2021-2032)
- 2.4 China Freight Forwarder Consumption Value (2021-2032)
- 2.5 Europe Freight Forwarder Consumption Value (2021-2032)
- 2.6 Japan Freight Forwarder Consumption Value (2021-2032)
- 2.7 South Korea Freight Forwarder Consumption Value (2021-2032)
- 2.8 ASEAN Freight Forwarder Consumption Value (2021-2032)
- 2.9 India Freight Forwarder Consumption Value (2021-2032)

### 3 WORLD FREIGHT FORWARDER COMPANIES COMPETITIVE ANALYSIS

- 3.1 World Freight Forwarder Revenue by Player (2021-2026)
- 3.2 Industry Rank and Concentration Rate (CR)

- 3.2.1 Global Freight Forwarder Industry Rank of Major Players
- 3.2.2 Global Concentration Ratios (CR4) for Freight Forwarder in 2025
- 3.2.3 Global Concentration Ratios (CR8) for Freight Forwarder in 2025
- 3.3 Freight Forwarder Company Evaluation Quadrant
- 3.4 Freight Forwarder Market: Overall Company Footprint Analysis
  - 3.4.1 Freight Forwarder Market: Region Footprint
  - 3.4.2 Freight Forwarder Market: Company Product Type Footprint
  - 3.4.3 Freight Forwarder Market: Company Product Application Footprint
- 3.5 Competitive Environment
  - 3.5.1 Historical Structure of the Industry
  - 3.5.2 Barriers of Market Entry
  - 3.5.3 Factors of Competition
- 3.6 Mergers & Acquisitions Activity

#### **4 UNITED STATES VS CHINA VS REST OF WORLD (BY HEADQUARTER LOCATION)**

- 4.1 United States VS China: Freight Forwarder Revenue Comparison (by Headquarter Location)
  - 4.1.1 United States VS China: Freight Forwarder Revenue Comparison (2021 & 2025 & 2032) (by Headquarter Location)
  - 4.1.2 United States VS China: Freight Forwarder Revenue Market Share Comparison (2021 & 2025 & 2032)
- 4.2 United States Based Companies VS China Based Companies: Freight Forwarder Consumption Value Comparison
  - 4.2.1 United States VS China: Freight Forwarder Consumption Value Comparison (2021 & 2025 & 2032)
  - 4.2.2 United States VS China: Freight Forwarder Consumption Value Market Share Comparison (2021 & 2025 & 2032)
- 4.3 United States Based Freight Forwarder Companies and Market Share, 2021-2026
  - 4.3.1 United States Based Freight Forwarder Companies, Headquarters (States, Country)
  - 4.3.2 United States Based Companies Freight Forwarder Revenue, (2021-2026)
- 4.4 China Based Companies Freight Forwarder Revenue and Market Share, 2021-2026
  - 4.4.1 China Based Freight Forwarder Companies, Company Headquarters (Province, Country)
  - 4.4.2 China Based Companies Freight Forwarder Revenue, (2021-2026)
- 4.5 Rest of World Based Freight Forwarder Companies and Market Share, 2021-2026
  - 4.5.1 Rest of World Based Freight Forwarder Companies, Headquarters (Province,

Country)

4.5.2 Rest of World Based Companies Freight Forwarder Revenue (2021-2026)

## **5 MARKET ANALYSIS BY TRANSPORTATION MODE TYPES**

5.1 World Freight Forwarder Market Size Overview by Transportation Mode Types:  
2021 VS 2025 VS 2032

5.2 Segment Introduction by Transportation Mode Types

5.2.1 Ocean Freight Forwarding

5.2.2 Air Freight Forwarding

5.2.3 Road Freight Forwarding

5.2.4 Rail Freight Forwarding

5.2.5 Multimodal Freight Forwarding

5.3 Market Segment by Transportation Mode Types

5.3.1 World Freight Forwarder Market Size by Transportation Mode Types  
(2021-2026)

5.3.2 World Freight Forwarder Market Size by Transportation Mode Types  
(2027-2032)

5.3.3 World Freight Forwarder Market Size Market Share by Transportation Mode  
Types (2027-2032)

## **6 MARKET ANALYSIS BY SERVICE COVERAGE TYPES**

6.1 World Freight Forwarder Market Size Overview by Service Coverage Types: 2021  
VS 2025 VS 2032

6.2 Segment Introduction by Service Coverage Types

6.2.1 Port-to-Port Freight Forwarding

6.2.2 Door-to-Port Freight Forwarding

6.2.3 Port-to-Door Freight Forwarding

6.2.4 Door-to-Door Freight Forwarding

6.3 Market Segment by Service Coverage Types

6.3.1 World Freight Forwarder Market Size by Service Coverage Types (2021-2026)

6.3.2 World Freight Forwarder Market Size by Service Coverage Types (2027-2032)

6.3.3 World Freight Forwarder Market Size Market Share by Service Coverage Types  
(2027-2032)

## **7 MARKET ANALYSIS BY CARGO HANDLING REQUIREMENT TYPES**

7.1 World Freight Forwarder Market Size Overview by Cargo Handling Requirement

Types: 2021 VS 2025 VS 2032

## 7.2 Segment Introduction by Cargo Handling Requirement Types

7.2.1 General Cargo Freight Forwarding

7.2.2 Temperature-controlled Freight Forwarding

7.2.3 Dangerous Goods Freight Forwarding

7.2.4 Project and Oversized Cargo Freight Forwarding

7.2.5 High-value and Time-critical Freight Forwarding

## 7.3 Market Segment by Cargo Handling Requirement Types

7.3.1 World Freight Forwarder Market Size by Cargo Handling Requirement Types (2021-2026)

7.3.2 World Freight Forwarder Market Size by Cargo Handling Requirement Types (2027-2032)

7.3.3 World Freight Forwarder Market Size Market Share by Cargo Handling Requirement Types (2027-2032)

## 8 MARKET ANALYSIS BY APPLICATION

8.1 World Freight Forwarder Market Size Overview by Application: 2021 VS 2025 VS 2032

## 8.2 Segment Introduction by Application

8.2.1 Retail and E-commerce

8.2.2 Automotive Industry

8.2.3 Consumer Electronics

8.2.4 Pharmaceuticals and Healthcare

8.2.5 Food and Beverage

8.2.6 Chemicals and Hazardous Materials

8.2.7 Others

## 8.3 Market Segment by Application

8.3.1 World Freight Forwarder Market Size by Application (2021-2026)

8.3.2 World Freight Forwarder Market Size by Application (2027-2032)

8.3.3 World Freight Forwarder Market Size Market Share by Application (2021-2032)

## 9 COMPANY PROFILES

### 9.1 Kuehne + Nagel International AG

9.1.1 Kuehne + Nagel International AG Details

9.1.2 Kuehne + Nagel International AG Major Business

9.1.3 Kuehne + Nagel International AG Freight Forwarder Product and Services

9.1.4 Kuehne + Nagel International AG Freight Forwarder Revenue, Gross Margin and

## Market Share (2021-2026)

9.1.5 Kuehne + Nagel International AG Recent Developments/Updates

9.1.6 Kuehne + Nagel International AG Competitive Strengths & Weaknesses

## 9.2 DHL Global Forwarding (DHL Group)

9.2.1 DHL Global Forwarding (DHL Group) Details

9.2.2 DHL Global Forwarding (DHL Group) Major Business

9.2.3 DHL Global Forwarding (DHL Group) Freight Forwarder Product and Services

9.2.4 DHL Global Forwarding (DHL Group) Freight Forwarder Revenue, Gross Margin and Market Share (2021-2026)

9.2.5 DHL Global Forwarding (DHL Group) Recent Developments/Updates

9.2.6 DHL Global Forwarding (DHL Group) Competitive Strengths & Weaknesses

## 9.3 DSV A/S

9.3.1 DSV A/S Details

9.3.2 DSV A/S Major Business

9.3.3 DSV A/S Freight Forwarder Product and Services

9.3.4 DSV A/S Freight Forwarder Revenue, Gross Margin and Market Share (2021-2026)

9.3.5 DSV A/S Recent Developments/Updates

9.3.6 DSV A/S Competitive Strengths & Weaknesses

## 9.4 CEVA Logistics SA

9.4.1 CEVA Logistics SA Details

9.4.2 CEVA Logistics SA Major Business

9.4.3 CEVA Logistics SA Freight Forwarder Product and Services

9.4.4 CEVA Logistics SA Freight Forwarder Revenue, Gross Margin and Market Share (2021-2026)

9.4.5 CEVA Logistics SA Recent Developments/Updates

9.4.6 CEVA Logistics SA Competitive Strengths & Weaknesses

## 9.5 GEODIS SA

9.5.1 GEODIS SA Details

9.5.2 GEODIS SA Major Business

9.5.3 GEODIS SA Freight Forwarder Product and Services

9.5.4 GEODIS SA Freight Forwarder Revenue, Gross Margin and Market Share (2021-2026)

9.5.5 GEODIS SA Recent Developments/Updates

9.5.6 GEODIS SA Competitive Strengths & Weaknesses

## 9.6 Expeditors International of Washington, Inc.

9.6.1 Expeditors International of Washington, Inc. Details

9.6.2 Expeditors International of Washington, Inc. Major Business

9.6.3 Expeditors International of Washington, Inc. Freight Forwarder Product and

## Services

9.6.4 Expeditors International of Washington, Inc. Freight Forwarder Revenue, Gross Margin and Market Share (2021-2026)

9.6.5 Expeditors International of Washington, Inc. Recent Developments/Updates

9.6.6 Expeditors International of Washington, Inc. Competitive Strengths & Weaknesses

9.7 Nippon Express Co., Ltd. (NX Group)

9.7.1 Nippon Express Co., Ltd. (NX Group) Details

9.7.2 Nippon Express Co., Ltd. (NX Group) Major Business

9.7.3 Nippon Express Co., Ltd. (NX Group) Freight Forwarder Product and Services

9.7.4 Nippon Express Co., Ltd. (NX Group) Freight Forwarder Revenue, Gross Margin and Market Share (2021-2026)

9.7.5 Nippon Express Co., Ltd. (NX Group) Recent Developments/Updates

9.7.6 Nippon Express Co., Ltd. (NX Group) Competitive Strengths & Weaknesses

9.8 Kintetsu World Express, Inc.

9.8.1 Kintetsu World Express, Inc. Details

9.8.2 Kintetsu World Express, Inc. Major Business

9.8.3 Kintetsu World Express, Inc. Freight Forwarder Product and Services

9.8.4 Kintetsu World Express, Inc. Freight Forwarder Revenue, Gross Margin and Market Share (2021-2026)

9.8.5 Kintetsu World Express, Inc. Recent Developments/Updates

9.8.6 Kintetsu World Express, Inc. Competitive Strengths & Weaknesses

9.9 Yusen Logistics Co., Ltd.

9.9.1 Yusen Logistics Co., Ltd. Details

9.9.2 Yusen Logistics Co., Ltd. Major Business

9.9.3 Yusen Logistics Co., Ltd. Freight Forwarder Product and Services

9.9.4 Yusen Logistics Co., Ltd. Freight Forwarder Revenue, Gross Margin and Market Share (2021-2026)

9.9.5 Yusen Logistics Co., Ltd. Recent Developments/Updates

9.9.6 Yusen Logistics Co., Ltd. Competitive Strengths & Weaknesses

9.10 Sinotrans Limited

9.10.1 Sinotrans Limited Details

9.10.2 Sinotrans Limited Major Business

9.10.3 Sinotrans Limited Freight Forwarder Product and Services

9.10.4 Sinotrans Limited Freight Forwarder Revenue, Gross Margin and Market Share (2021-2026)

9.10.5 Sinotrans Limited Recent Developments/Updates

9.10.6 Sinotrans Limited Competitive Strengths & Weaknesses

9.11 Hellmann Worldwide Logistics SE & Co. KG

- 9.11.1 Hellmann Worldwide Logistics SE & Co. KG Details
- 9.11.2 Hellmann Worldwide Logistics SE & Co. KG Major Business
- 9.11.3 Hellmann Worldwide Logistics SE & Co. KG Freight Forwarder Product and Services
- 9.11.4 Hellmann Worldwide Logistics SE & Co. KG Freight Forwarder Revenue, Gross Margin and Market Share (2021-2026)
- 9.11.5 Hellmann Worldwide Logistics SE & Co. KG Recent Developments/Updates
- 9.11.6 Hellmann Worldwide Logistics SE & Co. KG Competitive Strengths & Weaknesses
- 9.12 Rhenus Group
  - 9.12.1 Rhenus Group Details
  - 9.12.2 Rhenus Group Major Business
  - 9.12.3 Rhenus Group Freight Forwarder Product and Services
  - 9.12.4 Rhenus Group Freight Forwarder Revenue, Gross Margin and Market Share (2021-2026)
  - 9.12.5 Rhenus Group Recent Developments/Updates
  - 9.12.6 Rhenus Group Competitive Strengths & Weaknesses
- 9.13 DACHSER SE
  - 9.13.1 DACHSER SE Details
  - 9.13.2 DACHSER SE Major Business
  - 9.13.3 DACHSER SE Freight Forwarder Product and Services
  - 9.13.4 DACHSER SE Freight Forwarder Revenue, Gross Margin and Market Share (2021-2026)
  - 9.13.5 DACHSER SE Recent Developments/Updates
  - 9.13.6 DACHSER SE Competitive Strengths & Weaknesses
- 9.14 C.H. Robinson Worldwide, Inc.
  - 9.14.1 C.H. Robinson Worldwide, Inc. Details
  - 9.14.2 C.H. Robinson Worldwide, Inc. Major Business
  - 9.14.3 C.H. Robinson Worldwide, Inc. Freight Forwarder Product and Services
  - 9.14.4 C.H. Robinson Worldwide, Inc. Freight Forwarder Revenue, Gross Margin and Market Share (2021-2026)
  - 9.14.5 C.H. Robinson Worldwide, Inc. Recent Developments/Updates
  - 9.14.6 C.H. Robinson Worldwide, Inc. Competitive Strengths & Weaknesses
- 9.15 KLN Logistics Group Limited
  - 9.15.1 KLN Logistics Group Limited Details
  - 9.15.2 KLN Logistics Group Limited Major Business
  - 9.15.3 KLN Logistics Group Limited Freight Forwarder Product and Services
  - 9.15.4 KLN Logistics Group Limited Freight Forwarder Revenue, Gross Margin and Market Share (2021-2026)

9.15.5 KLN Logistics Group Limited Recent Developments/Updates

9.15.6 KLN Logistics Group Limited Competitive Strengths & Weaknesses

## **10 INDUSTRY CHAIN ANALYSIS**

10.1 Freight Forwarder Industry Chain

10.2 Freight Forwarder Upstream Analysis

10.3 Freight Forwarder Midstream Analysis

10.4 Freight Forwarder Downstream Analysis

## **11 RESEARCH FINDINGS AND CONCLUSION**

## **12 APPENDIX**

12.1 Methodology

12.2 Research Process and Data Source

12.3 Disclaimer

## List Of Tables

### LIST OF TABLES

Table 1. World Freight Forwarder Revenue by Region (2021, 2025 and 2032) & (USD Million), (by Headquarter Location)

Table 2. World Freight Forwarder Revenue by Region (2021-2026) & (USD Million), (by Headquarter Location)

Table 3. World Freight Forwarder Revenue by Region (2027-2032) & (USD Million), (by Headquarter Location)

Table 4. World Freight Forwarder Revenue Market Share by Region (2021-2026), (by Headquarter Location)

Table 5. World Freight Forwarder Revenue Market Share by Region (2027-2032), (by Headquarter Location)

Table 6. Major Market Trends

Table 7. World Freight Forwarder Consumption Value Growth Rate Forecast by Region (2021 & 2025 & 2032) & (USD Million)

Table 8. World Freight Forwarder Consumption Value by Region (2021-2026) & (USD Million)

Table 9. World Freight Forwarder Consumption Value Forecast by Region (2027-2032) & (USD Million)

Table 10. World Freight Forwarder Revenue by Player (2021-2026) & (USD Million)

Table 11. Revenue Market Share of Key Freight Forwarder Players in 2025

Table 12. World Freight Forwarder Industry Rank of Major Player, Based on Revenue in 2025

Table 13. Global Freight Forwarder Company Evaluation Quadrant

Table 14. Head Office of Key Freight Forwarder Players

Table 15. Freight Forwarder Market: Company Product Type Footprint

Table 16. Freight Forwarder Market: Company Product Application Footprint

Table 17. Freight Forwarder Mergers & Acquisitions Activity

Table 18. United States VS China Freight Forwarder Revenue Comparison, (2021 & 2025 & 2032) & (USD Million)

Table 19. United States VS China Freight Forwarder Consumption Value Comparison, (2021 & 2025 & 2032) & (USD Million)

Table 20. United States Based Freight Forwarder Companies, Headquarters (States, Country)

Table 21. United States Based Companies Freight Forwarder Revenue, (2021-2026) & (USD Million)

Table 22. United States Based Companies Freight Forwarder Revenue Market Share

(2021-2026)

Table 23. China Based Freight Forwarder Companies, Headquarters (Province, Country)

Table 24. China Based Companies Freight Forwarder Revenue, (2021-2026) & (USD Million)

Table 25. China Based Companies Freight Forwarder Revenue Market Share (2021-2026)

Table 26. Rest of World Based Freight Forwarder Companies, Headquarters (Province, Country)

Table 27. Rest of World Based Companies Freight Forwarder Revenue (2021-2026) & (USD Million)

Table 28. Rest of World Based Companies Freight Forwarder Revenue Market Share (2021-2026)

Table 29. World Freight Forwarder Market Size by Transportation Mode Types, (USD Million), 2021 & 2025 & 2032

Table 30. World Freight Forwarder Market Size Value by Transportation Mode Types (2021-2026) & (USD Million)

Table 31. World Freight Forwarder Market Size by Transportation Mode Types (2027-2032) & (USD Million)

Table 32. World Freight Forwarder Market Size by Service Coverage Types, (USD Million), 2021 & 2025 & 2032

Table 33. World Freight Forwarder Market Size Value by Service Coverage Types (2021-2026) & (USD Million)

Table 34. World Freight Forwarder Market Size by Service Coverage Types (2027-2032) & (USD Million)

Table 35. World Freight Forwarder Market Size by Cargo Handling Requirement Types, (USD Million), 2021 & 2025 & 2032

Table 36. World Freight Forwarder Market Size Value by Cargo Handling Requirement Types (2021-2026) & (USD Million)

Table 37. World Freight Forwarder Market Size by Cargo Handling Requirement Types (2027-2032) & (USD Million)

Table 38. World Freight Forwarder Market Size by Application, (USD Million), 2021 & 2025 & 2032

Table 39. World Freight Forwarder Market Size by Application (2021-2026) & (USD Million)

Table 40. World Freight Forwarder Market Size by Application (2027-2032) & (USD Million)

Table 41. Kuehne + Nagel International AG Basic Information, Manufacturing Base and Competitors

|                                                                                                                                  |
|----------------------------------------------------------------------------------------------------------------------------------|
| Table 42. Kuehne + Nagel International AG Major Business                                                                         |
| Table 43. Kuehne + Nagel International AG Freight Forwarder Product and Services                                                 |
| Table 44. Kuehne + Nagel International AG Freight Forwarder Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)   |
| Table 45. Kuehne + Nagel International AG Recent Developments/Updates                                                            |
| Table 46. Kuehne + Nagel International AG Competitive Strengths & Weaknesses                                                     |
| Table 47. DHL Global Forwarding (DHL Group) Basic Information, Manufacturing Base and Competitors                                |
| Table 48. DHL Global Forwarding (DHL Group) Major Business                                                                       |
| Table 49. DHL Global Forwarding (DHL Group) Freight Forwarder Product and Services                                               |
| Table 50. DHL Global Forwarding (DHL Group) Freight Forwarder Revenue, Gross Margin and Market Share (2021-2026) & (USD Million) |
| Table 51. DHL Global Forwarding (DHL Group) Recent Developments/Updates                                                          |
| Table 52. DHL Global Forwarding (DHL Group) Competitive Strengths & Weaknesses                                                   |
| Table 53. DSV A/S Basic Information, Manufacturing Base and Competitors                                                          |
| Table 54. DSV A/S Major Business                                                                                                 |
| Table 55. DSV A/S Freight Forwarder Product and Services                                                                         |
| Table 56. DSV A/S Freight Forwarder Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)                           |
| Table 57. DSV A/S Recent Developments/Updates                                                                                    |
| Table 58. DSV A/S Competitive Strengths & Weaknesses                                                                             |
| Table 59. CEVA Logistics SA Basic Information, Manufacturing Base and Competitors                                                |
| Table 60. CEVA Logistics SA Major Business                                                                                       |
| Table 61. CEVA Logistics SA Freight Forwarder Product and Services                                                               |
| Table 62. CEVA Logistics SA Freight Forwarder Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)                 |
| Table 63. CEVA Logistics SA Recent Developments/Updates                                                                          |
| Table 64. CEVA Logistics SA Competitive Strengths & Weaknesses                                                                   |
| Table 65. GEODIS SA Basic Information, Manufacturing Base and Competitors                                                        |
| Table 66. GEODIS SA Major Business                                                                                               |
| Table 67. GEODIS SA Freight Forwarder Product and Services                                                                       |
| Table 68. GEODIS SA Freight Forwarder Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)                         |
| Table 69. GEODIS SA Recent Developments/Updates                                                                                  |
| Table 70. GEODIS SA Competitive Strengths & Weaknesses                                                                           |
| Table 71. Expeditors International of Washington, Inc. Basic Information, Manufacturing Base and Competitors                     |
| Table 72. Expeditors International of Washington, Inc. Major Business                                                            |
| Table 73. Expeditors International of Washington, Inc. Freight Forwarder Product and                                             |

## Services

Table 74. Expeditors International of Washington, Inc. Freight Forwarder Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)

Table 75. Expeditors International of Washington, Inc. Recent Developments/Updates

Table 76. Expeditors International of Washington, Inc. Competitive Strengths & Weaknesses

Table 77. Nippon Express Co., Ltd. (NX Group) Basic Information, Manufacturing Base and Competitors

Table 78. Nippon Express Co., Ltd. (NX Group) Major Business

Table 79. Nippon Express Co., Ltd. (NX Group) Freight Forwarder Product and Services

Table 80. Nippon Express Co., Ltd. (NX Group) Freight Forwarder Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)

Table 81. Nippon Express Co., Ltd. (NX Group) Recent Developments/Updates

Table 82. Nippon Express Co., Ltd. (NX Group) Competitive Strengths & Weaknesses

Table 83. Kintetsu World Express, Inc. Basic Information, Manufacturing Base and Competitors

Table 84. Kintetsu World Express, Inc. Major Business

Table 85. Kintetsu World Express, Inc. Freight Forwarder Product and Services

Table 86. Kintetsu World Express, Inc. Freight Forwarder Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)

Table 87. Kintetsu World Express, Inc. Recent Developments/Updates

Table 88. Kintetsu World Express, Inc. Competitive Strengths & Weaknesses

Table 89. Yusen Logistics Co., Ltd. Basic Information, Manufacturing Base and Competitors

Table 90. Yusen Logistics Co., Ltd. Major Business

Table 91. Yusen Logistics Co., Ltd. Freight Forwarder Product and Services

Table 92. Yusen Logistics Co., Ltd. Freight Forwarder Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)

Table 93. Yusen Logistics Co., Ltd. Recent Developments/Updates

Table 94. Yusen Logistics Co., Ltd. Competitive Strengths & Weaknesses

Table 95. Sinotrans Limited Basic Information, Manufacturing Base and Competitors

Table 96. Sinotrans Limited Major Business

Table 97. Sinotrans Limited Freight Forwarder Product and Services

Table 98. Sinotrans Limited Freight Forwarder Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)

Table 99. Sinotrans Limited Recent Developments/Updates

Table 100. Sinotrans Limited Competitive Strengths & Weaknesses

Table 101. Hellmann Worldwide Logistics SE & Co. KG Basic Information, Manufacturing Base and Competitors

|                                                                                                                                          |
|------------------------------------------------------------------------------------------------------------------------------------------|
| Table 102. Hellmann Worldwide Logistics SE & Co. KG Major Business                                                                       |
| Table 103. Hellmann Worldwide Logistics SE & Co. KG Freight Forwarder Product and Services                                               |
| Table 104. Hellmann Worldwide Logistics SE & Co. KG Freight Forwarder Revenue, Gross Margin and Market Share (2021-2026) & (USD Million) |
| Table 105. Hellmann Worldwide Logistics SE & Co. KG Recent Developments/Updates                                                          |
| Table 106. Hellmann Worldwide Logistics SE & Co. KG Competitive Strengths & Weaknesses                                                   |
| Table 107. Rhenus Group Basic Information, Manufacturing Base and Competitors                                                            |
| Table 108. Rhenus Group Major Business                                                                                                   |
| Table 109. Rhenus Group Freight Forwarder Product and Services                                                                           |
| Table 110. Rhenus Group Freight Forwarder Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)                             |
| Table 111. Rhenus Group Recent Developments/Updates                                                                                      |
| Table 112. Rhenus Group Competitive Strengths & Weaknesses                                                                               |
| Table 113. DACHSER SE Basic Information, Manufacturing Base and Competitors                                                              |
| Table 114. DACHSER SE Major Business                                                                                                     |
| Table 115. DACHSER SE Freight Forwarder Product and Services                                                                             |
| Table 116. DACHSER SE Freight Forwarder Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)                               |
| Table 117. DACHSER SE Recent Developments/Updates                                                                                        |
| Table 118. DACHSER SE Competitive Strengths & Weaknesses                                                                                 |
| Table 119. C.H. Robinson Worldwide, Inc. Basic Information, Manufacturing Base and Competitors                                           |
| Table 120. C.H. Robinson Worldwide, Inc. Major Business                                                                                  |
| Table 121. C.H. Robinson Worldwide, Inc. Freight Forwarder Product and Services                                                          |
| Table 122. C.H. Robinson Worldwide, Inc. Freight Forwarder Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)            |
| Table 123. C.H. Robinson Worldwide, Inc. Recent Developments/Updates                                                                     |
| Table 124. C.H. Robinson Worldwide, Inc. Competitive Strengths & Weaknesses                                                              |
| Table 125. KLN Logistics Group Limited Basic Information, Manufacturing Base and Competitors                                             |
| Table 126. KLN Logistics Group Limited Major Business                                                                                    |
| Table 127. KLN Logistics Group Limited Freight Forwarder Product and Services                                                            |
| Table 128. KLN Logistics Group Limited Freight Forwarder Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)              |
| Table 129. KLN Logistics Group Limited Recent Developments/Updates                                                                       |
| Table 130. KLN Logistics Group Limited Competitive Strengths & Weaknesses                                                                |
| Table 131. Global Key Players of Freight Forwarder Upstream (Raw Materials)                                                              |

Table 132. Global Freight Forwarder Typical Customers

## List Of Figures

### LIST OF FIGURES

Figure 1. Freight Forwarder Picture

Figure 2. World Freight Forwarder Total Revenue: 2021 & 2025 & 2032, (USD Million)

Figure 3. World Freight Forwarder Total Revenue (2021-2032) & (USD Million)

Figure 4. World Freight Forwarder Revenue by Region (2021, 2025 and 2032) & (USD Million), (by Headquarter Location)

Figure 5. World Freight Forwarder Revenue Market Share by Region (2021-2032), (by Headquarter Location)

Figure 6. United States Based Company Freight Forwarder Revenue (2021-2032) & (USD Million)

Figure 7. China Based Company Freight Forwarder Revenue (2021-2032) & (USD Million)

Figure 8. Europe Based Company Freight Forwarder Revenue (2021-2032) & (USD Million)

Figure 9. Japan Based Company Freight Forwarder Revenue (2021-2032) & (USD Million)

Figure 10. South Korea Based Company Freight Forwarder Revenue (2021-2032) & (USD Million)

Figure 11. ASEAN Based Company Freight Forwarder Revenue (2021-2032) & (USD Million)

Figure 12. India Based Company Freight Forwarder Revenue (2021-2032) & (USD Million)

Figure 13. Freight Forwarder Market Drivers

Figure 14. Factors Affecting Demand

Figure 15. World Freight Forwarder Consumption Value (2021-2032) & (USD Million)

Figure 16. World Freight Forwarder Consumption Value Market Share by Region (2021-2032)

Figure 17. United States Freight Forwarder Consumption Value (2021-2032) & (USD Million)

Figure 18. China Freight Forwarder Consumption Value (2021-2032) & (USD Million)

Figure 19. Europe Freight Forwarder Consumption Value (2021-2032) & (USD Million)

Figure 20. Japan Freight Forwarder Consumption Value (2021-2032) & (USD Million)

Figure 21. South Korea Freight Forwarder Consumption Value (2021-2032) & (USD Million)

Figure 22. ASEAN Freight Forwarder Consumption Value (2021-2032) & (USD Million)

Figure 23. India Freight Forwarder Consumption Value (2021-2032) & (USD Million)

Figure 24. Producer Shipments of Freight Forwarder by Player Revenue (\$MM) and Market Share (%): 2025

Figure 25. Global Four-firm Concentration Ratios (CR4) for Freight Forwarder Markets in 2025

Figure 26. Global Four-firm Concentration Ratios (CR8) for Freight Forwarder Markets in 2025

Figure 27. United States VS China: Freight Forwarder Revenue Market Share Comparison (2021 & 2025 & 2032)

Figure 28. United States VS China: Freight Forwarder Consumption Value Market Share Comparison (2021 & 2025 & 2032)

Figure 29. World Freight Forwarder Market Size by Transportation Mode Types, (USD Million), 2021 & 2025 & 2032

Figure 30. World Freight Forwarder Market Size Market Share by Transportation Mode Types in 2025

Figure 31. Ocean Freight Forwarding

Figure 32. Air Freight Forwarding

Figure 33. Road Freight Forwarding

Figure 34. Rail Freight Forwarding

Figure 35. Multimodal Freight Forwarding

Figure 36. World Freight Forwarder Market Size Market Share by Transportation Mode Types (2021-2032)

Figure 37. World Freight Forwarder Market Size by Service Coverage Types, (USD Million), 2021 & 2025 & 2032

Figure 38. World Freight Forwarder Market Size Market Share by Service Coverage Types in 2025

Figure 39. Port-to-Port Freight Forwarding

Figure 40. Door-to-Port Freight Forwarding

Figure 41. Port-to-Door Freight Forwarding

Figure 42. Door-to-Door Freight Forwarding

Figure 43. World Freight Forwarder Market Size Market Share by Service Coverage Types (2021-2032)

Figure 44. World Freight Forwarder Market Size by Cargo Handling Requirement Types, (USD Million), 2021 & 2025 & 2032

Figure 45. World Freight Forwarder Market Size Market Share by Cargo Handling Requirement Types in 2025

Figure 46. General Cargo Freight Forwarding

Figure 47. Temperature-controlled Freight Forwarding

Figure 48. Dangerous Goods Freight Forwarding

Figure 49. Project and Oversized Cargo Freight Forwarding

Figure 50. High-value and Time-critical Freight Forwarding

Figure 51. World Freight Forwarder Market Size Market Share by Cargo Handling Requirement Types (2021-2032)

Figure 52. World Freight Forwarder Market Size by Application, (USD Million), 2021 & 2025 & 2032

Figure 53. World Freight Forwarder Market Size Market Share by Application in 2025

Figure 54. Retail and E-commerce

Figure 55. Automotive Industry

Figure 56. Consumer Electronics

Figure 57. Pharmaceuticals and Healthcare

Figure 58. Food and Beverage

Figure 59. Chemicals and Hazardous Materials

Figure 60. Others

Figure 61. World Freight Forwarder Market Size Market Share by Application (2021-2032)

Figure 62. Freight Forwarder Industrial Chain

Figure 63. Methodology

Figure 64. Research Process and Data Source

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