

Multimodal Transport Market By Configuration (Two Mode, Three Mode, Hybrid/ Others), End-use Industry (Retail, Food & Beverages, Pharmaceuticals & Healthcare, Chemicals & Materials, Manufacturing), Region - Global Forecast to 2032

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Abstracts

The multimodal transport market is projected to reach USD 159.30 billion by 2032 from USD 98.61 billion in 2025 at a CAGR of 7.1%. Market growth is fueled by the need to streamline freight movement across increasingly fragmented global supply chains and the shift from single-mode trucking to integrated road–rail–waterway networks. Manufacturers and exporters are increasingly relying on multimodal services to manage rising shipment volumes, improve schedule reliability, and reduce transit variability, particularly as cross-border distribution becomes more time-sensitive. Advanced digital platforms enabling end-to-end visibility, automated documentation, and dynamic route optimization, supporting greater adoption of coordinated transport under a single service umbrella. Infrastructure upgrades, including new intermodal terminals, port-rail links, the revival of inland waterways, and multimodal logistics parks, are enhancing network fluidity and enabling higher throughput with fewer handoffs. Policy measures promoting modal shift and sustainability, such as carbon-reduction mandates and incentives for rail and coastal shipping, are accelerating the transition toward lower-emission freight combinations. Geopolitical disruptions, shifting trade lanes, and nearshoring trends are prompting companies to diversify routing options and build redundancy into transport networks. The rising demand for resilience, cost discipline, and scalable capacity is also driving closer collaboration between shippers and logistics providers, positioning multimodal transport as a critical enabler of future-ready supply chains.

“Hybrid-mode configurations are expected to witness significant demand in the multimodal transport market during the forecast period.”

Hybrid-mode configurations are expected to experience notable demand in the multimodal transport market during the forecast period, as companies increasingly require flexible movement of freight across changing trade conditions and network constraints. Unlike fixed two-mode arrangements, hybrid setups enable cargo to shift between different transport combinations, such as road–rail–waterways or road–air–waterways, based on capacity availability, route accessibility, and service priorities. This adaptable structure is gaining traction among industries with variable shipment patterns, including pharmaceuticals, electronics, and high-value manufacturing, where delivery timing and risk diversification are critical. Growth in cross-border distribution and seasonal volume surges is also encouraging the adoption of hybrid movements that can reroute cargo through alternative ports or inland corridors when disruptions occur. Logistics providers are supporting this shift by expanding multimodal connectivity at key gateways, enhancing coordination across carriers, and integrating digital tools that enable real-time mode switching. As supply chains shift toward more agile operating models, hybrid-mode configurations are emerging as a crucial option for shippers seeking continuity, tailored service levels, and enhanced control over international freight flows.

“The retail end-use industry held the second-largest share of the multimodal transport market in 2024.”

The retail end-use industry accounted for the second-largest share of the multimodal transport market in 2024, driven by the rapid evolution of consumer buying patterns and the increasing need for synchronized product movement across diverse distribution points. With the rise of omnichannel models, where physical stores, online platforms, and regional fulfillment centers operate as a unified network, retailers require transport solutions that can handle frequent restocking, dispersed delivery routes, and fluctuating order volumes. Multimodal setups enable retailers to combine long-haul efficiency with flexible regional distribution, using sea or rail for bulk inbound flows and road for time-sensitive outbound movements to stores and urban hubs. The expansion of grocery e-commerce and temperature-controlled product lines is also creating greater reliance on integrated logistics, particularly for maintaining product integrity during transfers between modes. Additionally, high return rates, promotional spikes, and holiday-season surges demand transport models that offer predictable lead times without increasing cost burdens.

“Asia Pacific held the largest share of the multimodal transport market in 2024.”

The Asia Pacific accounted for the largest share of the multimodal transport market in 2024, driven by its dominant position in global manufacturing, export-oriented production, and rapidly expanding regional trade flows. The presence of major industrial hubs across China, India, Japan, and Southeast Asia has created dense freight corridors that link factories, inland logistics zones, and maritime gateways, resulting in a high reliance on integrated road–rail–sea combinations for both domestic distribution and international shipment cycles. The region’s extensive port network, including major transshipment centers such as Singapore, Shanghai, and Busan, enhances connectivity to North America, Europe, and the Middle East. The rising intra-Asia trade is increasing demand for shorter, multimodal routes between emerging consumer markets. Large-scale infrastructure programs, such as China’s Belt and Road Initiative, India’s multimodal logistics parks, and Southeast Asia’s rail expansion projects, are improving capacity, reducing transfer bottlenecks, and enabling faster modal transitions. Additionally, rapid growth in e-commerce, urban consumption, and contract manufacturing is driving higher freight volumes that require coordinated transport solutions. As companies prioritize cost efficiency, resilience, and regional supply-chain integration, the Asia Pacific is expected to retain its leading position throughout the forecast period.

In-depth interviews were conducted with CEOs, marketing directors, other innovation and technology directors, and executives from various key organizations operating in this market.

By Company Type: MNC 90% and Tier I - 10%

By Designation: C- Level 45%, Director-Level- 30%, and Others - 25%

By Region: Asia Pacific – 35%, North America – 40%, and Europe – 25%

The multi-modal transport market is dominated by major players, including DSV (Denmark), Deutsche Post AG (Germany), Kuehne+Nagel (Switzerland), NIPPON EXPRESS HOLDINGS (Japan), and A.P. Moller ? Maersk (Denmark). These companies are expanding their portfolios to strengthen their multimodal transport market position.

Research Coverage:

The report covers the multimodal transport market in terms of configuration type (two-

Multimodal Transport Market By Configuration (Two Mode, Three Mode, Hybrid/ Others), End-use Industry (Retail,...

mode, three-mode, and hybrid/others), end-use industry (retail, manufacturing, healthcare & pharmaceuticals, food & beverages, chemicals & materials, oil & gas, and others), and region. It covers the competitive landscape and company profiles of the significant multimodal transport market players.

The study also includes an in-depth competitive analysis of the key market players, their company profiles, key observations related to product and business offerings, recent developments, and key market strategies.

Key Benefits of Buying the Report:

The report will help market leaders/new entrants with information on the closest approximations of revenue numbers for the multimodal transport market and its subsegments.

This report will help stakeholders understand the competitive landscape and gain more insights to position their businesses better and plan suitable go-to-market strategies.

The report will also help stakeholders understand the market pulse and provide information on key market drivers, restraints, challenges, and opportunities.

The report will also help stakeholders understand the current and future pricing trends of the multimodal transport market.

The report will help market leaders/new entrants with information on various trends in the multimodal transport market based on configuration type, end-use industry, and region.

The report provides insight into the following points:

Analysis of key drivers (electrification to dominate the freight movement globally, cost efficiency through optimization and dynamic mode routing), restraints (dominance of road transport due to its flexibility and reliability, hindering modal shifts, limited adoption among SMEs due to complexity and resource constraints), opportunities (market access and entry into new trade routes, reduction of trade barriers fosters smoother cross-border movement of goods), and challenges (regulatory and legal barriers, including varying policies across

regions)

Product Development/Innovation: Detailed insights into upcoming technologies, research & development activities, and product launches in the multimodal transport market

Market Development: Comprehensive information about lucrative markets (the report analyzes the multimodal transport market across varied regions)

Market Diversification: Exhaustive information about new products & services, untapped geographies, recent developments, and investments in the multimodal transport market

Competitive Assessment: In-depth assessment of shares, growth strategies, and service offerings of leading players, such as DSV (Denmark), Deutsche Post AG (Germany), Kuehne+Nagel (Switzerland), NIPPON EXPRESS HOLDINGS (Japan), and A.P. Moller ? Maersk (Denmark), in the multimodal transport market

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