

Urban Freight Market Forecasts to 2034 – Global Analysis By Freight Type (General Cargo, Parcel and Express Freight, Food and Perishable Freight, Retail Freight, Industrial and Manufacturing Freight, Construction Materials, and Temperature-Controlled Freight), Vehicle Type, Freight Movement, Operational Model, End User, and By Geography

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Abstracts

According to Statistics MRC, the Global Urban Freight Market is accounted for \$147.3 billion in 2026 and is expected to reach \$318.1 billion by 2034 growing at a CAGR of 10.1% during the forecast period. Urban freight refers to the transportation of goods within urban areas, encompassing general cargo, parcel and express freight, food and perishable freight, retail freight, industrial and manufacturing freight, construction materials, and temperature-controlled freight. The market utilizes various vehicle types including light commercial vehicles, medium-duty trucks, heavy-duty trucks, electric vans and trucks, cargo bikes and two-wheelers, and alternative-fuel vehicles. Freight movements include first-mile, mid-mile, last-mile, and reverse freight.

Market Dynamics:

Driver:

Rapid urbanization and e-commerce growth driving freight demand

The accelerating global urbanization and exponential e-commerce growth are primary drivers for the urban freight market. Urban populations require daily delivery of food, goods, and materials. E-commerce generates substantial parcel and express freight

volumes. Construction and infrastructure development drive demand for building materials. Retail and wholesale distribution require efficient freight movement. As urban populations grow and e-commerce expands, urban freight demand increases across all freight categories, supporting sustained market growth.

Restraint:

Urban congestion and delivery restrictions

Increasing urban congestion and regulatory restrictions on freight vehicles represent major restraints for the urban freight market. Traffic congestion delays deliveries and increases operational costs. City center access restrictions limit delivery windows and vehicle types. Emissions regulations are driving fleet modernization requirements. Noise restrictions affect delivery timing. Limited loading zones challenge operations. These congestion and regulatory challenges may constrain market growth and require significant operational adjustments.

Opportunity:

Adoption of electric and alternative-fuel vehicles

The growing adoption of electric and alternative-fuel vehicles for urban freight presents significant opportunities for market expansion. Electric vans and trucks offer zero-emission delivery solutions. Government incentives accelerate fleet electrification. Lower operating costs improve total cost of ownership. Cargo bikes provide efficient last-mile delivery in dense urban areas. As sustainability requirements increase, electrified freight fleets capture growing market share.

Threat:

Driver shortages and rising operational costs

Driver shortages and increasing operational costs pose significant threats to urban freight market growth. Competition for qualified drivers is intense. Rising fuel and maintenance costs affect profitability. Insurance premiums are increasing. Labor regulations affect operational flexibility. These operational challenges may constrain service expansion and increase costs for freight operators, particularly smaller carriers.

Covid-19 Impact:

The COVID-19 pandemic significantly accelerated urban freight demand as e-commerce surged. Home delivery of goods became essential during lockdowns. Freight

operators scaled operations to meet demand. Retail and grocery delivery volumes increased dramatically. Post-pandemic, sustained e-commerce growth has supported continued freight demand, with urban freight remaining essential infrastructure.

The Parcel and Express Freight segment is expected to be the largest during the forecast period

The Parcel and Express Freight segment is expected to account for the largest market share during the forecast period, driven by the exponential growth of e-commerce and consumer expectations for fast delivery. Parcel and express freight represents the most visible and rapidly growing urban freight category. The segment benefits from e-commerce expansion and same-day delivery expectations. Growing consumer demand for convenience supports market expansion. As the foundational urban freight category, parcel and express maintains the largest freight type segment share.

The Last-Mile Freight segment is expected to have the highest CAGR during the forecast period

Over the forecast period, the Last-Mile Freight segment is predicted to witness the highest growth rate, fueled by the critical role of final delivery in customer satisfaction and the high cost and complexity of last-mile operations. Last-mile freight represents the most challenging and expensive component of urban freight. The segment benefits from e-commerce growth and rapid delivery expectations. Growing urban delivery volumes support market expansion. As e-commerce continues growing, last-mile freight delivers the fastest freight movement segment growth.

Region with largest share:

During the forecast period, the Asia-Pacific region is expected to hold the largest market share, supported by the world's largest urban populations, rapid e-commerce growth, and extensive freight infrastructure. China leads regional growth with the world's largest logistics market. High population density supports efficient freight operations. Growing manufacturing and retail sectors drive freight demand. With the largest urban freight volumes, Asia Pacific maintains its dominant market position.

Region with highest CAGR:

Over the forecast period, the Asia-Pacific region is anticipated to exhibit the highest

CAGR, driven by continued urbanization, e-commerce expansion, and infrastructure investment across India and Southeast Asia. The region's growing urban populations create substantial freight demand. Expanding digital commerce supports market growth. Government infrastructure investment accelerates logistics development. As urban freight ecosystems mature, Asia Pacific delivers the fastest market growth globally.

Key players in the market

Some of the key players in Urban Freight Market include DHL Group, United Parcel Service, Inc., FedEx Corporation, XPO, Inc., DSV A/S, Kuehne+Nagel International AG, GXO Logistics, Inc., CEVA Logistics, DB Schenker, Maersk, SF Express, JD Logistics, Delhivery Limited, Blue Dart Express Limited, and Deutsche Post AG.

Key Developments:

In September 2026, DHL Group signed a Memorandum of Understanding with CATL to establish green freight corridors across Europe, deploying electric commercial vehicles, high-power depot chargers, and urban battery-swapping pilot programs to decarbonize road freight.

In April 2026, GXO Logistics deployed upgraded AI-driven warehouse automation within its urban distribution hubs, leveraging its GXO IQ platform to accelerate batch sorting and optimize outbound urban dispatch schedules.

In January 2026, FedEx expanded its zero-tailpipe emissions urban fleet in Japan by introducing 17 electric trucks—including Mitsubishi Fuso eCanter and Isuzu ELF EVs—to service dense metropolitan delivery routes across Tokyo, Kanagawa, and Osaka.

In January 2026, Kuehne+Nagel introduced a dedicated omnichannel urban fulfillment and last-mile platform, linking regional multi-client distribution centers directly with local carrier micro-delivery networks.

Freight Types Covered:

General Cargo

Parcel and Express Freight

Food and Perishable Freight

Retail Freight

Industrial and Manufacturing Freight

Construction Materials

Temperature-Controlled Freight

Vehicle Types Covered:

Light Commercial Vehicles

Medium-Duty Trucks

Heavy-Duty Trucks

Electric Vans and Trucks

Cargo Bikes and Two-Wheelers

Alternative-Fuel Vehicles

Freight Movements Covered:

First-Mile Freight

Mid-Mile Freight

Last-Mile Freight

Reverse Freight

Operational Models Covered:

Direct Delivery

Hub-and-Spoke

Urban Consolidation Centers

Micro-Distribution Centers

Multi-Modal Freight

End Users Covered:

Retail and E-Commerce

Food and Beverage

Manufacturing

Construction

Healthcare and Pharmaceuticals

Wholesale and Distribution

Other End Users

Regions Covered:

North America

United States

Canada

Mexico

Europe

United Kingdom

Germany

France

Italy

Spain

Netherlands

Belgium

Sweden

Switzerland

Poland

Rest of Europe

Asia Pacific

China

Japan

India

South Korea

Australia

Indonesia

Thailand

Malaysia

Singapore

Vietnam

Rest of Asia Pacific

South America

Brazil

Argentina

Colombia

Chile

Peru

Rest of South America

Rest of the World (RoW)

Middle East

Saudi Arabia

United Arab Emirates

Qatar

Israel

Rest of Middle East

Africa

South Africa

Egypt

Morocco

Rest of Africa

What our report offers:

Market share assessments for the regional and country-level segments

Strategic recommendations for the new entrants

Covers Market data for the years 2023, 2024, 2025, 2026, 2027, 2028, 2030, 2032 and 2034

Market Trends (Drivers, Constraints, Opportunities, Threats, Challenges, Investment Opportunities, and recommendations)

Strategic recommendations in key business segments based on the market estimations

Competitive landscaping mapping the key common trends

Company profiling with detailed strategies, financials, and recent developments

Supply chain trends mapping the latest technological advancements

Free Customization Offerings:

All the customers of this report will be entitled to receive one of the following free customization options:

Company Profiling

Comprehensive profiling of additional market players (up to 3)

SWOT Analysis of key players (up to 3)

Regional Segmentation

Market estimations, Forecasts and CAGR of any prominent country as per the client's interest (Note: Depends on feasibility check)

Competitive Benchmarking

Benchmarking of key players based on product portfolio, geographical presence, and strategic alliances

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