
Description: The global freight forwarding market is estimated to have contracted by 1.6% in nominal terms in 2015. In both air and sea freight, all the global metrics point to a year-on-year slow down in volume growth.

The author forecasts a real 15-19 CAGR of 4.6% for the global freight forwarding market. Europe’s market share of this is expected to contract whilst emerging regions gain share in its place. Intra-regional trade dominates the global picture, with the top three intra-regional trade lanes alone accounting for 52% of global trade. However, new trade deals such as the TransPacific Partnership and the Transatlantic Trade and Investment Partnership are likely to boost trade between APAC and North America, and the EU and the US.

Combined, the 20 leading forwarders are thought to represent almost 58% of the market, but small forwarders continue to effectively compete against the largest in the industry, demonstrating that economies of scale are not the be-all and end-all of the business.

For SMEs to prosper they must exploit the opportunities that the democratization of technology has brought in order to grow and lock in customers.

- Disintermediation from cloud-based technology start-ups is unlikely, but the technology itself will become increasingly important for freight forwarders.

- A collaborative supply network, driven by software and with a scope beyond individual supply chains, could transform the industry.

- Mergers and acquisitions in the industry have disrupted the global, air and sea freight rankings. DSV’s acquisition of UTi caused the most impact with the combined entity’s forwarding revenues estimated to be around €2bn larger than DSV a year ago. Looking ahead, it would be surprising if there were no significant deals to alter the landscape of the market even more. Further consolidation seems inevitable.

- The systemic impact of low global oil prices has been a double edged sword for freight forwarders; whilst some have been able to increase their profit margin, others have taken a substantial hit to revenues as a result of declining demand for industrial projects.

- With low demand in the market, several companies look to be focusing their efforts on improving profitability rather than growth. This has been manifested through rationalisation, investments in software, and an emphasis on high value contract opportunities.

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