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Global Freight Forwarding 2019 - Market Report

Global Freight Forwarding 2019 provides a detailed look at major trends and drivers affecting the freight forwarding market in 2019 and beyond.

Knowing the forwarding market is changing is not enough – leaders need to know where the market is headed, how their competitors are reacting, and the steps to take today so they're in a position to win tomorrow.

GFF19 examines key trends in forwarding that have and will continue to cause profound transformation. These are:

- The state and disruption of the global forwarding market.
- The threats and opportunities tech-enabled forwarders face over the next 5 years.
- The changing role of freight forwarders in global supply chains.

This report contains:

- Market sizing including 2018 and 5-year CARG growth rates 2018-2023
- Extensive, market-wide, survey-based primary research
- Detailed analysis of the present and future of freight forwarding
- Comprehensive profiles of the largest freight forwarders
- An evaluation of technology in freight forwarding

A sneak preview

much up for debate. Will new technologies just lead to process efficiency or 'breaking the paradigm'?

4.2 Will answers come from digital forwarding?

Digital Forwarders		Digital Marketplaces
<p>Most recently Flexport raised \$18m in a funding round led by SoftBank's Vision Fund. Current investors Founders Fund, DST Global, Cherubic Ventures, Susa Ventures and S.F. Express were "significant" participants in the event.</p> <p>FreightHub: Northzone, Global Founders Capital, Cherry Ventures, Cavalry Ventures, Saarbruecker21 and La Familia. The company has raised a total of \$43.23m in funding.</p> <p>iContainers: Kibo Ventures, Serena Capital and Grupo Torretta. The company has raised \$8.33m in funding.</p> <p>Fleet: 1517 Fund, GrowthX, Hunt Technology Ventures and NFO Ventures.</p> <p>ZenCargo: UK-based, \$4m seed funding including MPGL Pius Capital, LocalGlobe and Sarnos Investments.</p>		<p>Freightos: GE Ventures, Aleph, Ansox Capital, ICV, OurCrowd, MSR Capital and Sadaro Ventures.</p> <p>Xeneta: Norwegian-based, Creandum, Alliance Venture, Smedvig Capital plus others Around \$20m funding.</p> <p>Cargobase: 500 Startups, Bukit Timah Capital and Ikon Yeo. The company has received \$1.3m in funding.</p> <p>Simpliship: Boston-based, privately owned online marketplace.</p> <p>CoLoadX: Right Side Capital, Entrepreneurs Roundtable, Silicon Badia and others. Around \$1m funding.</p>
	<p>Traditional Forwarders Digital Offerings</p> <p>Agility (Shipa Freight) Kuehne + Nagel (Freight Net) Panalpina DHL (Freightquote) Damco (Twill) Geodis (Upply) DB Schenker (Connect 4.0)</p>	

On the left are just some of the new digital forwarders which are developing. They do everything which a traditional forwarder can do, but, they would argue, they have the advantage of starting with a clean sheet of paper, technology-wise. They do not need to worry about adapting legacy systems in an attempt to provide item-level transparency, for example, as they can use the latest technology built from scratch. Flexport is the best known of this new breed, achieving recent funding of \$1 billion in a funding round led by SoftBank's Vision Fund. However, there are other such as FreightHub, iContainers, Fleet and ZenCargo which have attracted smaller but still significant finance. These have the potential to be the true market disruptors as they are aiming to grab market share from the incumbents.

On the right are the freight marketplaces. These should not be confused with the digital freight forwarders as they solely provide a market for shippers or freight forwarders to get quotes or in some cases, book direct, with carriers or NVOCCs. They are facilitators and do not aim to compete with forwarders, rather improve the processes for them and allow them to offer a more competitive service. Amongst the best well known are Freightos, Xeneta, Cargobase, Simpliship and CoLoadX.

And in the centre here we have the digital offerings of the traditional forwarders including: Agility (Shipa Freight); Kuehne + Nagel (Freight Net); Panalpina; DHL (Freightquote); Damco (Twill); Geodis (Upply) and DB Schenker (Connect 4.0). As we will see these are aimed at small and medium-sized shippers or ad hoc business, a market which traditionally been the preserve of smaller forwarders due to the cost to serve the customer.

7.0 Global Freight Forwarding Market Size & Growth 2018

Figure 7.1 2018 Global Freight Forwarding Market Growth Heatmap



Figure 7.2 2023 CAGR Global Freight Forwarding Market Growth Heatmap



Have a question? Contact Michael Clover mclover@ti-insight.com or call +44 (0)1666 519907 for more information or visit the report page: <https://www.ti-insight.com/product/global-freight-forwarding/>

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