

Freight Forwarding at a Crossroads:

Preparing for
2026 and Beyond



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For over 25 years, trusted supply chain and logistics analyst, Adrian Gonzalez, has served as a strategic advisor to top executives across manufacturing, retail, third-party logistics, and technology sectors.

Adrian is the founder and host of Talking Logistics (www.talkinglogistics.com), a video talk show where industry thought leaders and newsmakers share insights and discuss critical topics shaping the supply chain and logistics landscape.

As the founder of Indago (www.joinindago.com), he leads a market research community of supply chain practitioners dedicated to exchanging practical knowledge and advice in a confidential, trusted space while supporting charitable causes that make a difference.

Through Adelante SCM, Adrian empowers young supply chain professionals to connect, share expertise, and grow within a private, solicitation-free environment.

A former adjunct instructor of Supply Chain Management at Northeastern University's Executive MBA program, he is also an accomplished public speaker and writer with a knack for sparking meaningful conversations and delivering actionable insights.

Executive Summary

The greatest risk in this moment isn't the turbulence of the market itself, it's staying still.

Thus, **future growth calls for a fresh approach**, especially when the pace of change continues to accelerate with even higher rates of unpredictability.

This is on top of the other pressures freight forwarders are facing, seemingly from every direction, like volatile trade policy, surging customer expectations, and a new wave of automation powered by AI.

This report highlights the fresh approach the most resilient and successful forwarders are adopting in 2026 and beyond:

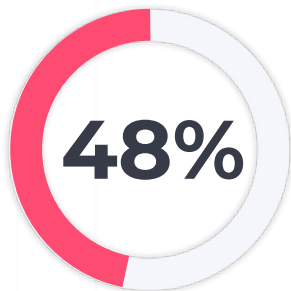
- ▶ Embracing **automation** for efficiency and compliance
- ▶ Investing in **practical modernization**
- ▶ Closing the **AI understanding gap**
- ▶ Balancing transformation with **human connection and trust**

Our research reveals a widening gap between those who are adapting with clear strategic bets and those falling behind. The divide between large and small forwarders is growing, especially in AI readiness, tech investment, and customer satisfaction.

Standout Stats:



of forwarders are automating documentation, compliance, and invoicing workflows, however, there was a sizeable gap between large and small forwarders who say that they have "No major modernization initiatives at this time" compared to larger ones (20% vs. 6%).



of respondents cite "lack of internal AI expertise" as the top barrier to adoption, highlighting a need for new approaches to hiring and training.



of respondents rank trusted relationships as their #1 success driver, especially among small forwarders (97%), an interesting paradox considering the parallel push for digitization. The challenge will be in using technology to elevate human experiences, not replace them.



Introduction

The famous management consultant and author Peter Drucker once said, “The greatest danger in times of turbulence is not the turbulence - it is to act with yesterday’s logic.”

So far, 2025 has been a relatively turbulent year for freight forwarders and logistics service providers. The tariff war, which began in January after the election of Donald Trump as U.S. president, has brought added risk, uncertainty, and costs to global trade operations. What makes it especially challenging is the ongoing changes, with tariffs increased, decreased, added, or eliminated, almost on a daily basis.

For example, on April 2, 2025, or “Liberation Day” as President Trump called it, the administration announced:

“10% tariffs on all imports into the United States, and even higher tariffs on goods from about 60 countries or trading blocs that have a high trade deficit with the US,” as reported at the time by Bryan Mena at CNN.

“That includes China and the European Union, which will be levied new duties of 34% and 20%, respectively,” added Mena.

These tariffs were ultimately paused for 90 days until July 9, then paused again until August 1.

In the meantime, “Trump issued letters to more than two dozen world leaders setting new import tax rates that their countries’ exports to the U.S. would face beginning in August,” as reported by Kevin Breuninger at CNBC. “Most of those new tariff rates were close to the April 2 levels that Trump had initially arrived at by using a formula that economists had criticized. But some were much higher. Brazil, for instance, went from facing a 10% tariff to bracing for a 50% duty.”

This was followed by the U.S. and several countries, including the UK, Japan, Korea, Vietnam, and the European Union, establishing bilateral tariff agreements before the August 1 deadline. As of this writing, negotiations continue between the U.S. and China (and with Mexico, Canada, Australia, India, and other important trading partners too).

In addition to all that, effective August 29, 2025, the de minimis exemption for commercial shipments will be suspended. Per the Executive Order issued in July 30, “imported goods sent through means other than the international postal network that are valued at or under \$800 and that would otherwise qualify for the de minimis exemption will be subject to all applicable duties.” The de minimis exemption was already eliminated for shipments from China and Hong Kong in May 2025.

What will happen next on the tariffs and regulatory compliance fronts? Nobody knows for sure, which is what makes operating in this highly uncertain and ever-changing global trade environment so challenging for freight forwarders and shippers alike.

Compounding this turbulence is the rapid changes happening on the technology front -- specifically, with Artificial Intelligence (AI). “Artificial intelligence is going to replace literally half of all white-collar workers in the U.S.,” Ford CEO Jim Farley said in June 2025 at the Aspen Ideas Festival, as reported in a Wall Street Journal article titled, “CEOs Start Saying the Quiet Part Out Loud: AI Will Wipe Out Jobs.” Here is another excerpt from the article:

[Ford CEO’s] remarks reflect an emerging shift in how many executives explain the potential human cost from the technology. Until now, few corporate leaders have wanted to publicly acknowledge the extent to which white-collar jobs could vanish. In interviews, CEOs often hedge when asked about job losses, noting that innovation historically creates a range of new roles.

In private, though, CEOs have spent months whispering about how their businesses could likely be run with a fraction of the current staff.

Shopify Chief Executive Tobi Lütke recently told workers that the company wouldn’t make any new hires unless managers could prove artificial intelligence isn’t capable of doing the job.

Needless to say, with headlines and comments like these, AI is creating a lot of fear and uncertainty amongst workers, with many people viewing it as a threat to their jobs.

That said, it's important to note that AI is not something completely new; in reality, aspects of AI have been used in supply chain management and logistics for decades (e.g., rule-based logic, basic machine learning, pattern recognition, and deterministic optimization capabilities). These established forms of AI help people do their jobs more effectively, and they have had a relatively limited impact on jobs. It's the newer forms of AI -- that is, Generative AI, Agentic AI, and Sequential Decision-Making -- that could result in the elimination of many jobs.

How much of the work done today by freight forwarding professionals will be handed over to AI agents that can analyze situations, develop strategies, and execute tasks independently? And how quickly will this happen?

Again, it is hard to know for sure. What we do know, based on findings from "The State of Digitization in Freight Forwarding 2025" report published in February 2025, is that 18% of the freight forwarders and logistics service providers surveyed in November 2024 said they were "Very likely" to invest in AI in 2025 and 33% said they were "Somewhat likely."

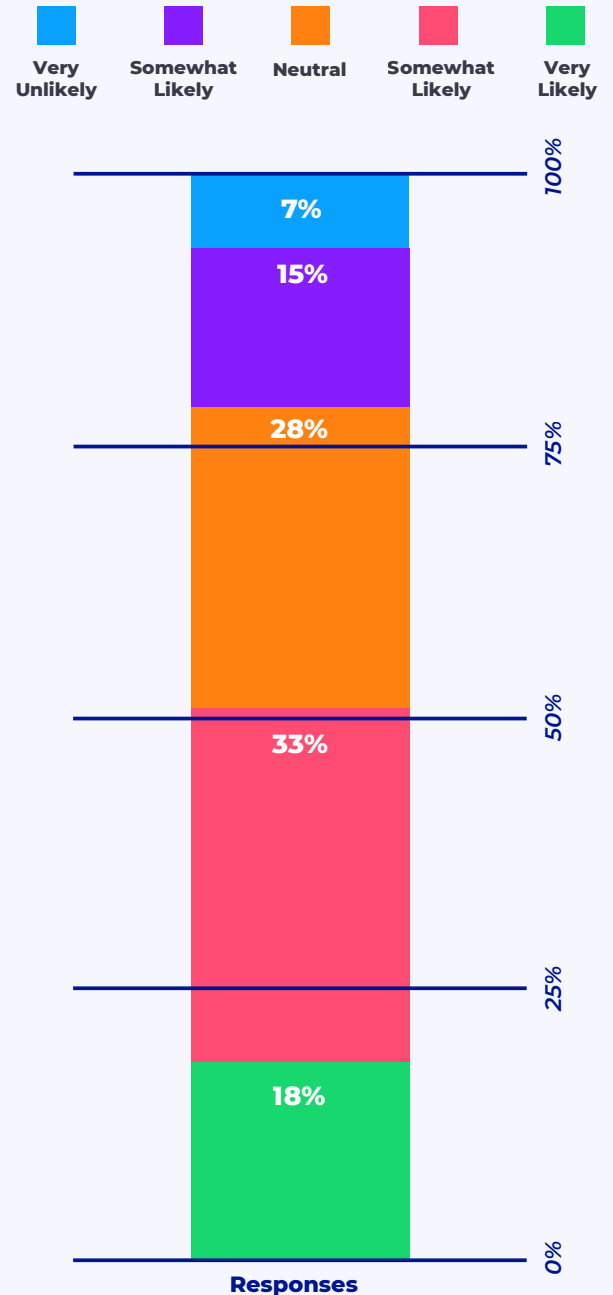
However, the research also revealed that larger freight forwarders were much more likely to invest in AI in 2025 than smaller ones. 68% of larger freight forwarders (those processing more than 100K TEUs annually) said they were "Very" or "Somewhat" likely to invest in AI this year while only 24% of smaller freight forwarders (those processing less than 10K TEUs annually) said the same.

In short, these findings suggest that an "AI divide" is emerging between large and small freight forwarders. How consequential this divide will be remains to be seen, but it won't take long to find out.

Back to the Drucker quote, the greatest danger freight forwarders face today is to respond to all of this change and uncertainty with the same logic (and the same skillsets, processes, and technologies) as yesterday.

Or in the words of Amazon's founder and former CEO Jeff Bezos, "What's dangerous is not to evolve." But evolve how? That is the question many freight forwarders are asking.

How likely is your organization to invest in artificial intelligence (AI) or machine learning (ML) to enhance operational capabilities in 2025?



Source: November 2024 Adelante SCM survey of 71 qualified and verified freight forwarders and third-party logistics providers (n=61 for this question)

Preparing for the Road Ahead

“The State of Digitization in Freight Forwarding 2025” report revealed many insights about the industry, too many to summarize here. But one of the key takeaways was this: **Freight Forwarders and Logistics Service Providers that fail to meet the technology expectations of their customers will likely lose business moving forward, while those that meet or exceed customer expectations will grow and gain market share.**

More than a third of the shippers surveyed (38%) in November 2024 said they were only “Slightly satisfied” (24%) or “Not satisfied at all” (14%) with the technological capabilities of their 3PLs or freight forwarders; none were “Extremely satisfied” and only 14% were “Very satisfied.” As one shipper executive put it, “We have some logistics partners who have best-in-class technology, while others lag behind with limited visibility and delays in messaging. We’re actively working to rid ourselves of the latter.”

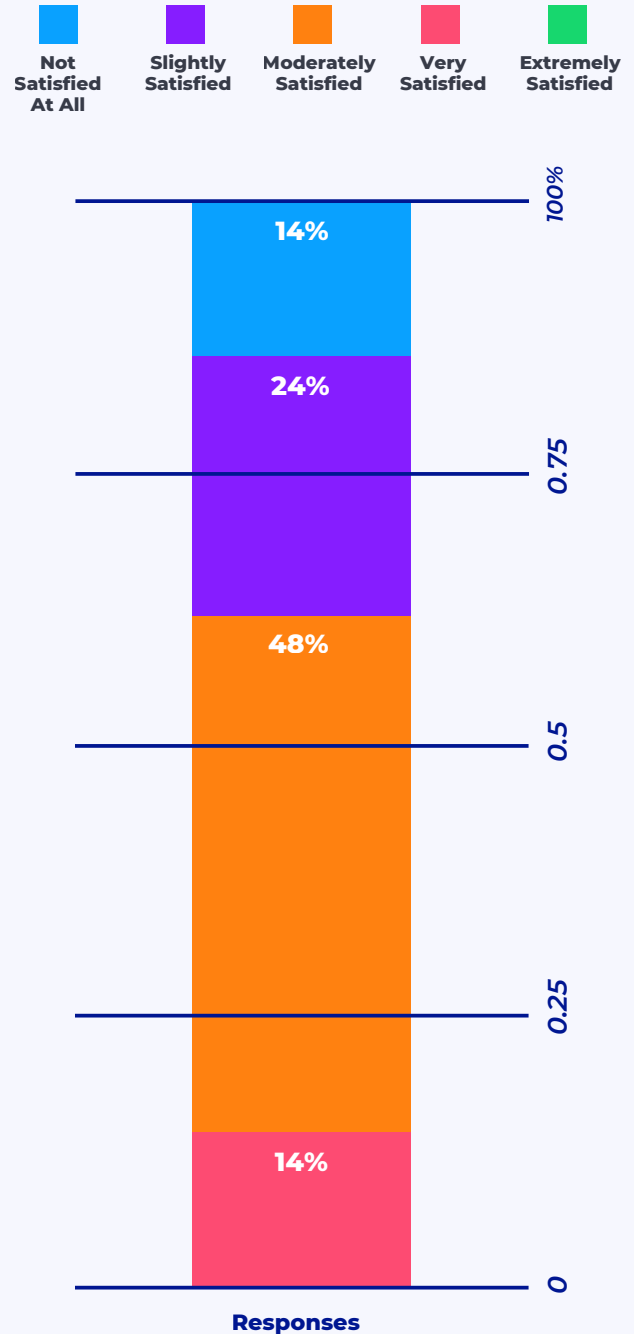
Why such low satisfaction? How can the industry better meet customer expectations?

Industry executives addressed those questions in a series of “lunch and learn” seminars hosted by Magaya in May 2025 to discuss some of the key findings from the research report. The executives shared various perspectives on the questions above, but the one that kept coming up was that to truly meet customer expectations, **there needs to be better alignment of objectives and metrics between freight forwarders and shippers.**

In other words, as they prepare for the road ahead, freight forwarders and shippers need to rethink their business relationships, that is, move away from short-term, transaction-based relationships to longer-term, outcome-based partnerships.

The freight forwarding executives who attended the seminars also agreed that in order to succeed moving forward, the industry needs to accelerate its digital transformation efforts. Investing in technology will enable them to become more productive and reduce costs, and it will help them better meet the expectations of their customers.

How satisfied are you with the technological capabilities of your current freight forwarders/3PLs?



Source: November 2024 Indago survey of 24 qualified and verified supply chain and logistics executives from manufacturing, retail, and distribution companies.

The executives also emphasized the role of employees in the success of digitization efforts. “If I can’t get most of my employees to write a coherent email, how am I going to get them to use any kind of sophisticated technology,” asked one of the executives. In short, the discussion revealed two critical success factors for the road ahead related to employees:

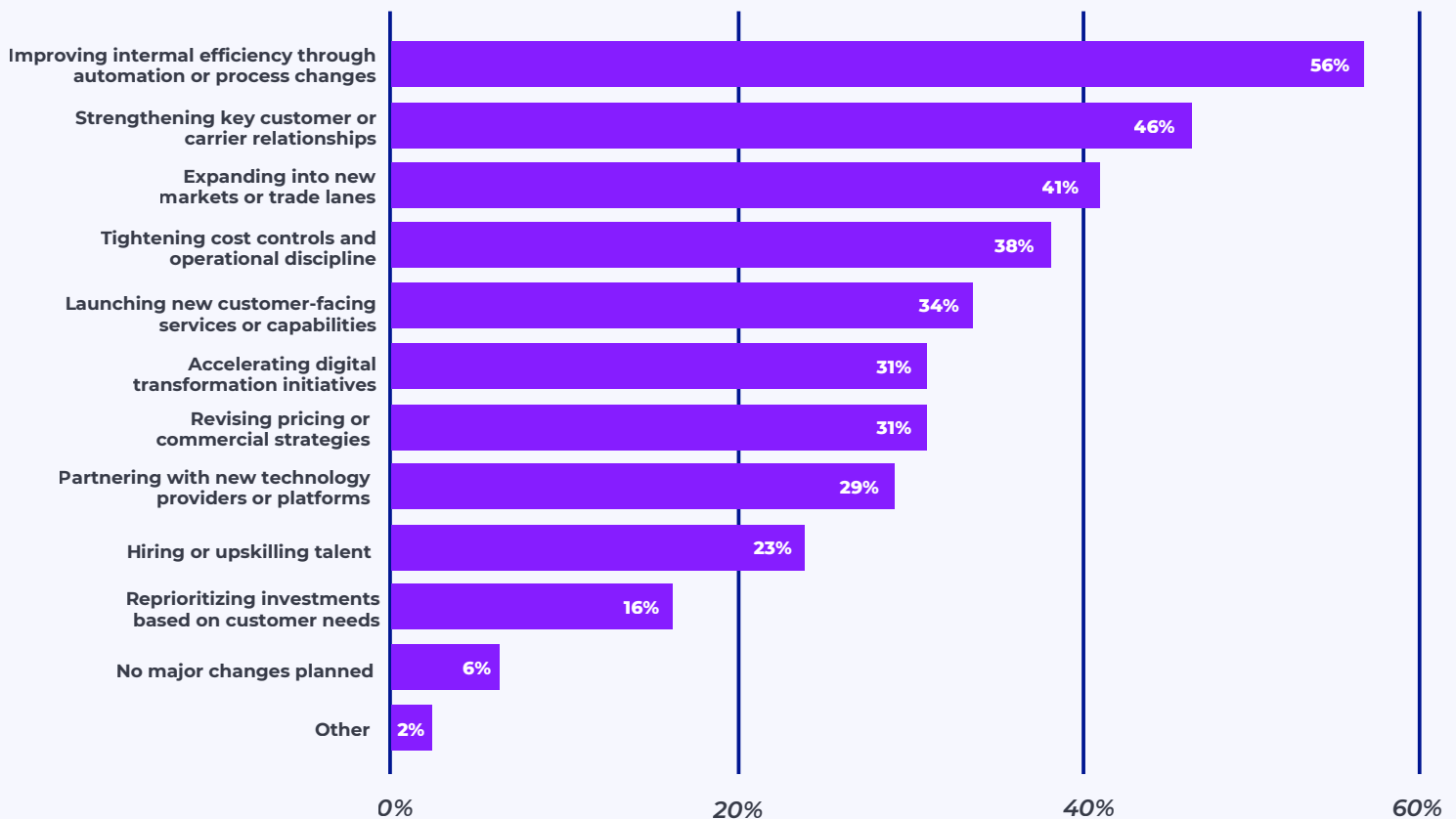
- ▶ **Freight forwarders need to upskill/reskill their employees.** Put differently, the type of employees you might have hired in the past might not be the most suitable in a tech-driven work environment. Therefore, in addition to revising their hiring requirements, freight forwarders need to invest in employee training. This includes both technical skills like data analysis, as well as soft skills like critical thinking, problem-solving, and communication.
- ▶ **Freight forwarders need to address upfront the concerns employees might have with technology, especially AI.** As the authors of a February 2022 Harvard Business Review article on automation technology advise, “As organizations look to the future, they must both address workers’ fears and build on their optimism by working to provide safe, productive workplaces and real opportunities for growth.”

Building on these recommendations, **Adelante SCM** and **Magaya** surveyed 110 freight forwarders and logistics service providers in early July 2025. The goal was to understand the adjustments, innovations, and strategic bets freight forwarders are making to stay ahead in this increasingly complex and dynamic market. Here are the key takeaways from the research results.

Freight Forwarders Focusing on “Improving Internal Efficiencies” in Second Half of 2025

More than half the survey respondents (56%) said they are focused on “Improving internal efficiencies through automation or process changes” in the second half of this year to meet their 2025 objectives and finish the year strong. This was followed by “Strengthening key customer or carrier relationships” (46%) and “Expanding into new markets and trade lanes” (41%).

What mid-year adjustments are you making (or planning to make) to meet your 2025 objectives and finish the year strong? Select all that apply.



Source: July 2025 Adelante SCM/Magaya survey of 110 qualified and verified freight forwarders and logistics service providers.



Overall, the results reveal that freight forwarders are taking a balanced approach to meeting their business objectives this year: they are balancing internal transformation (via automation and process changes) with market expansion and relationship-building efforts.

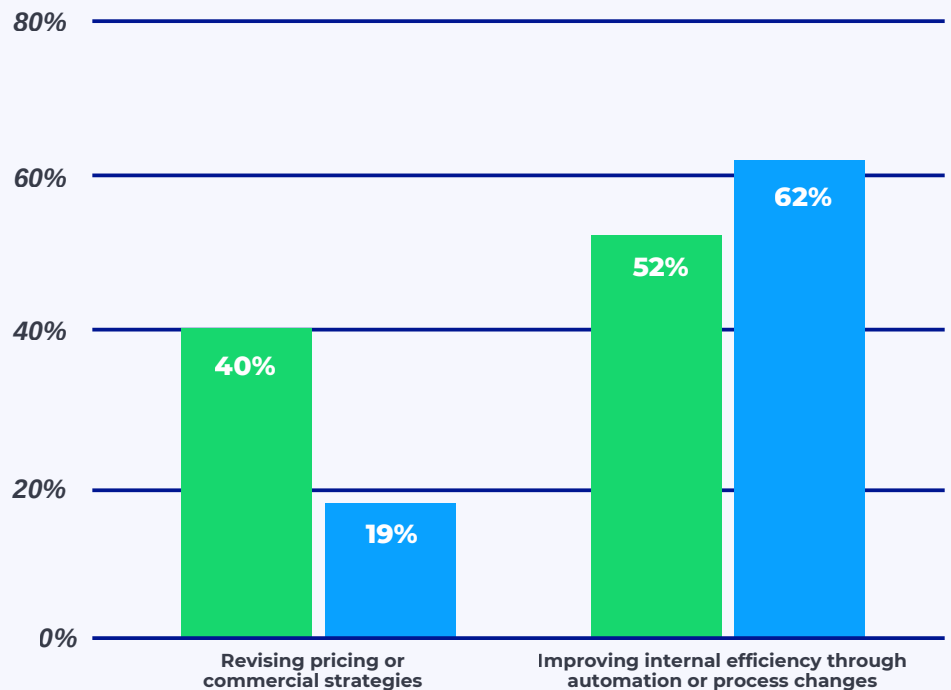
Although “Accelerating digital transformation initiatives” ranked lower on the list, investing in technology is presumably embedded in “improving internal efficiency via automation.” In other words, the results suggest that freight forwarders are prioritizing technology/digitization investments that clearly provide productivity and efficiency benefits, which is why, as discussed later, automating workflows topped the list of actions freight forwarders are taking to modernize their operations.

Finally, it’s interesting to highlight some differences between small freight forwarders (those processing less than 10,000 TEUs annually) and larger ones (those processing more than 10,000 TEUs annually).

Improving efficiency through automation and process changes is a shared priority, but it is more dominant among larger forwarders (62% vs. 52%). Meanwhile, small forwarders are far more likely to be revising pricing or commercial strategies than larger ones (40% vs. 19%). More research is required to understand why, but perhaps small forwarders are experiencing more margin pressure or volatile demand.

**What mid-year adjustments are you making (or planning to make) to meet your 2025 objectives and finish the year strong?
Select all that apply.**

■ LESS THAN 10K TEUS ■ MORE THAN 10K TEUS

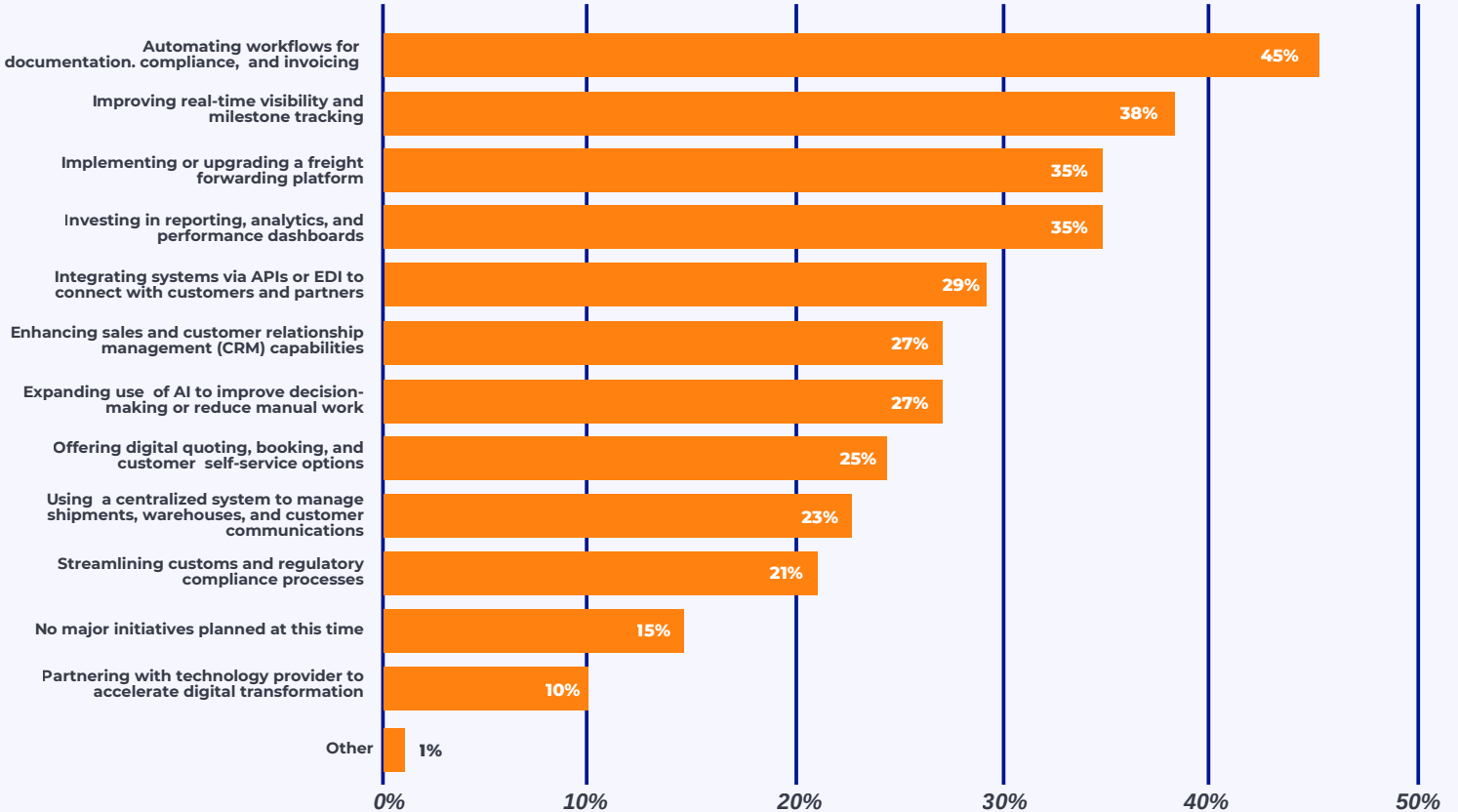


Source: July 2025 Adelante SCM/Magaya survey of qualified and verified freight forwarders and logistics service providers. n=60 for freight forwarders that process less than 10K TEUs annually and n=47 for freight forwarders that process more than 10K TEUs annually.

Forwarders Are Prioritizing “Automating Workflows” to Modernize Operations

Almost half the respondents (45%) said they are “Automating workflows for documentation, compliance, and invoicing” to modernize their operations and better meet shipper expectations around technology, visibility, and service. This was followed by “Improving real-time visibility and milestone tracking” (38%), “Implementing or upgrading a freight forwarding platform” (35%), and “Investing in reporting, analytics, and performance dashboards” (35%).

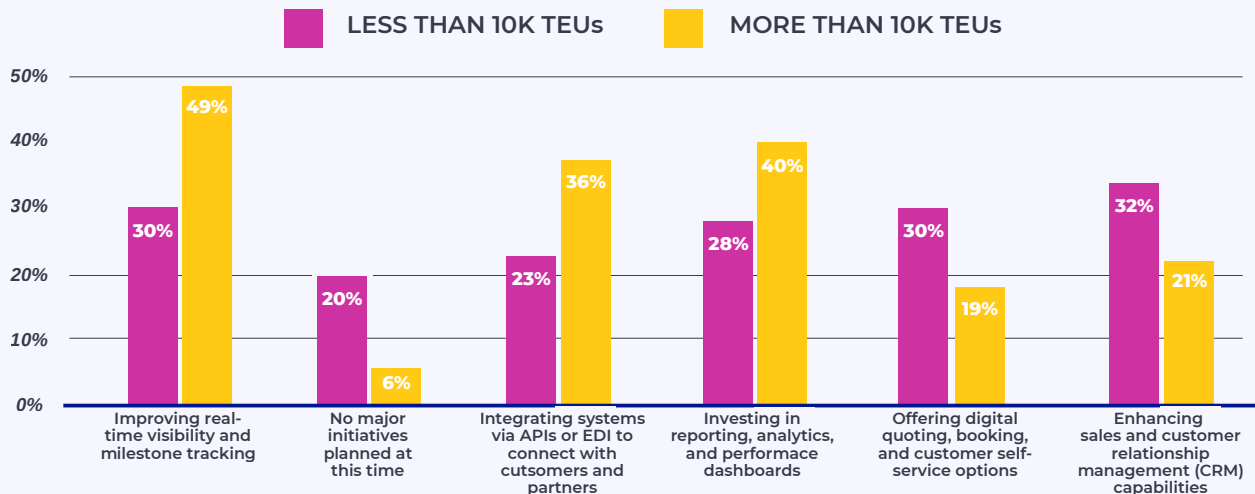
What actions have you been taking this year (or plan to take in the second half of 2025) to modernize operations and better meet shipper expectations around technology, visibility, and service? Select all that apply.



Source: July 2025 Adelante SCM/Magaya survey of 110 qualified and verified freight forwarders and logistics service providers.

Once again, however, there were some notable differences between small freight forwarders and larger ones.

What actions have you been taking this year (or plan to take in the second half of 2025) to modernize operations and better meet shipper expectations around technology, visibility, and service? Select all that apply.



Source: July 2025 Adelante SCM/Magaya survey of qualified and verified freight forwarders and logistics service providers. n=60 for freight forwarders that process less than 10K TEUs annually and n=47 for freight forwarders that process more than 10K TEUs annually.

First, a much larger percentage of small forwarders said they have “No major modernization initiatives at this time” compared to larger forwarders (20% vs. 6%). This may be due to resourcing or capability constraints.

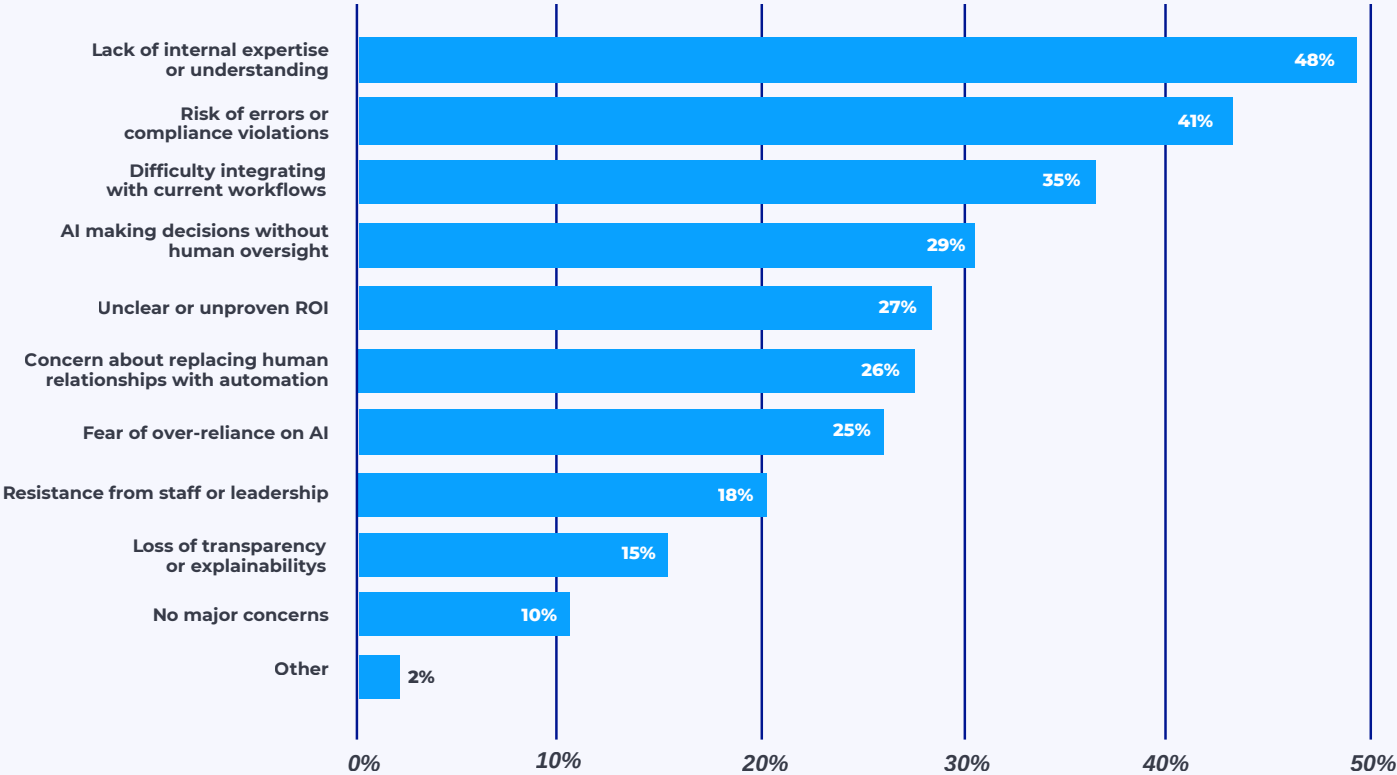
Second, “Improving real-time visibility and milestone tracking” is a much bigger focus for larger forwarders than small ones (49% vs. 30%). This correlates with the findings from the November 2024 survey, where “To improve end-to-end shipment visibility” was a bigger driver for digitization for larger freight forwarders than smaller ones (78% vs. 38%).

For larger forwarders, real-time visibility is arguably more critical to maintain control at scale and to support more advanced/complex operational models. Meanwhile, small forwarders might need to prioritize other modernization efforts that align more directly with their service model and resource availability. For example, small forwarders are focusing more on “Enhancing sales and customer relationship management capabilities” (32% vs. 21%) and on “Offering digital quoting, booking, and customer self-service option” (30% vs. 19%) than larger forwarders.

Biggest AI Challenge: Lack of Internal Expertise or Understanding

For small and larger freight forwarders alike, the biggest concern or challenge their organizations have about using AI—especially more autonomous or agentic AI systems—is “Lack of internal expertise or understanding,” which 48% of the respondents selected. This points back to the earlier discussion about the need for freight forwarders to upskill/reskill their employees. “Risk of errors or compliance violations” (41%) and “Difficulty integrating with current workflows” (35%) also ranked high.

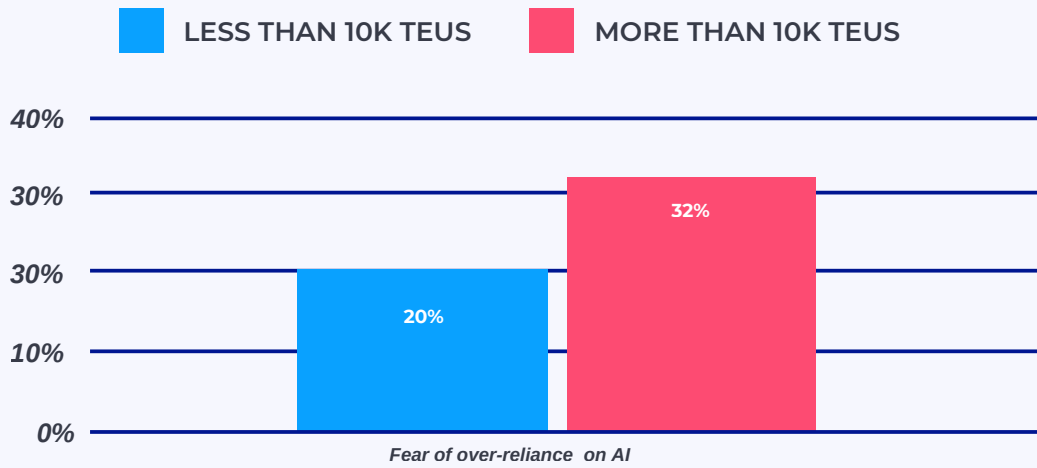
What concerns or challenges does your organization have about using AI - especially more autonomous or agentic AI system - in freight forwarding operations? Select all that apply.



Source: July 2025 Adelante SCM/Magaya survey of 110 qualified and verified freight forwarders and logistics service providers.

The survey results also showed that larger forwarders are significantly more concerned about overreliance on AI than small forwarders (32% vs. 20%). This may reflect their deeper experimentation with AI and a clearer understanding of its risks. Small forwarders, by contrast, may lack the maturity in AI deployment to see these risks yet, pointing to a gap in readiness and awareness.

What concerns or challenges does your organization have about using AI - especially more autonomous or agentic AI system - in freight forwarding operations? Select all that apply.



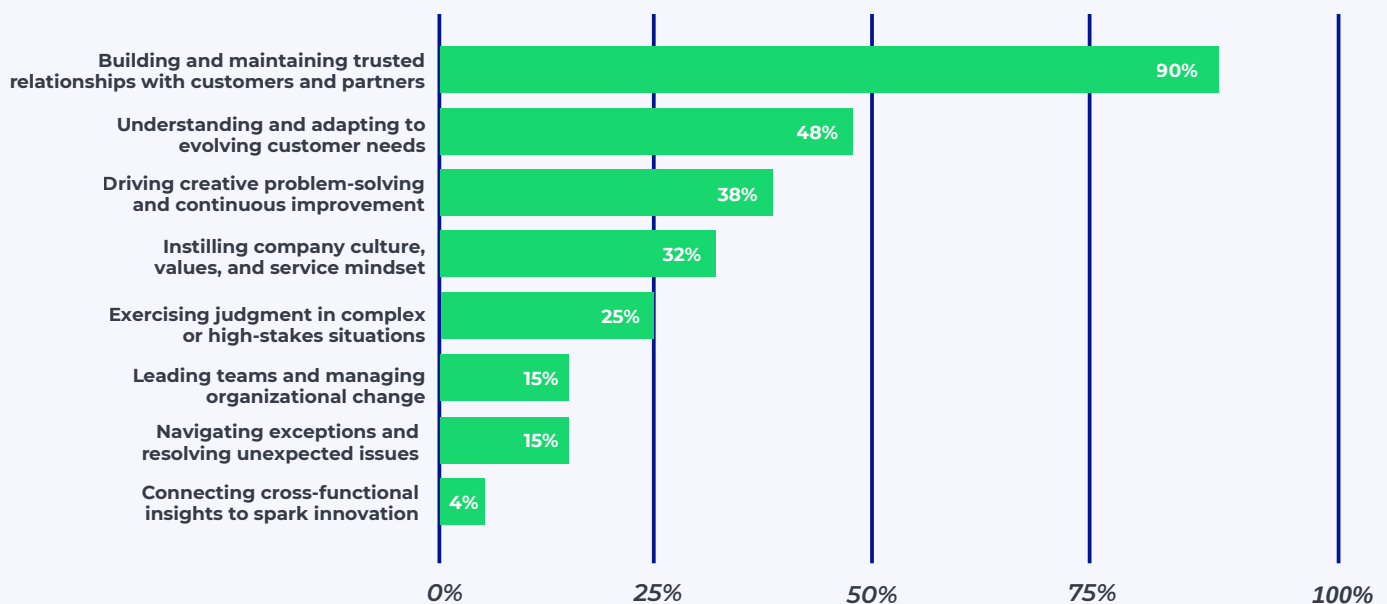
Source: July 2025 Adelante SCM/Magaya survey of qualified and verified freight forwarders and logistics service providers. n=60 for freight forwarders that process less than 10K TEUs annually and n=47 for freight forwarders that process more than 10K TEUs annually.

Building and Maintaining Trusted Relationships Remains Paramount

At the seminars referenced earlier, the executives who attended emphasized that despite the growing role and importance of technology in the industry, freight forwarding remains a relationship business. That is, you can't overstate the importance of the relationships created and nurtured between "Fred and Mary at your company with Sam and Audrey at your customers." It is those relationships, especially when challenges or disruptions arise, that are the foundation for long-term success.

The survey results underscored this point. By a very large margin, "Building and maintaining trusted relationships with customers and partners" topped the list of human capabilities that contribute the most to the success of their companies; it was selected by 90% of the respondents. This was followed by "Understanding and adapting to evolving customer needs" (48%) and "Driving creative problem solving and continuous improvement" (38%).

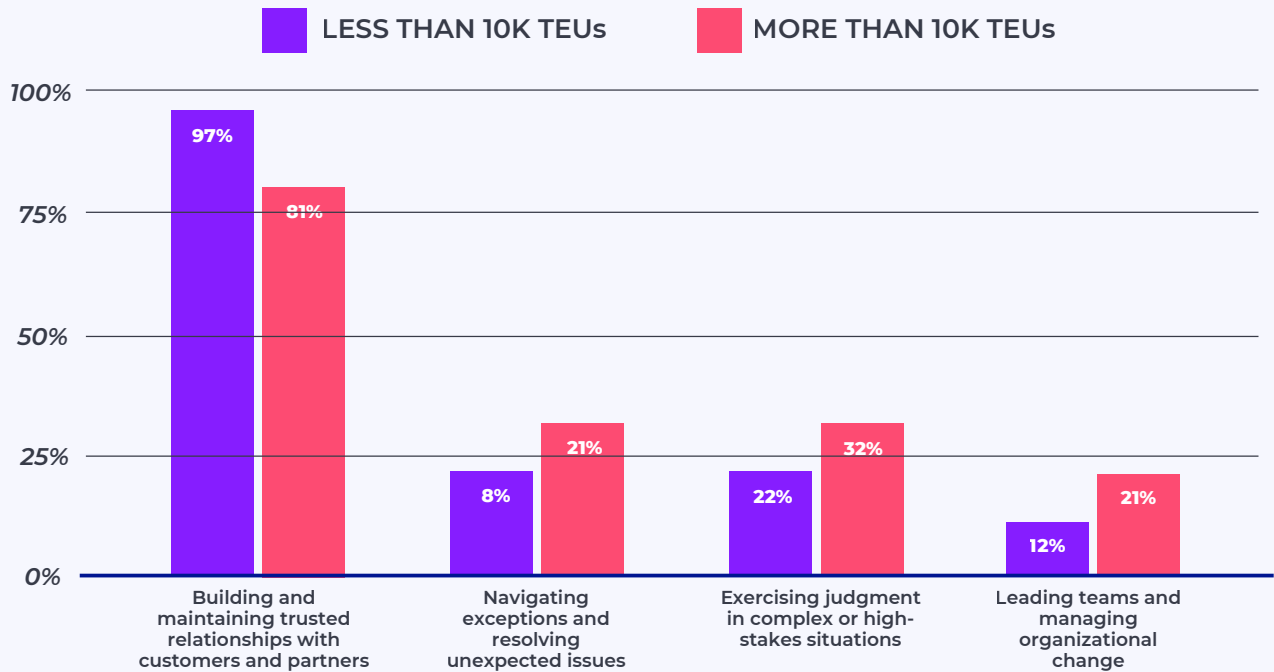
Which of the following human capabilities do you believe contribute most to your company's success? Select up to 3 responses.



Source: July 2025 Adelante SCM/Magaya survey of 110 qualified and verified freight forwarders and logistics service providers.

Although both groups prioritize trusted relationships, the survey results show that small forwarders view it as more critical (97% vs. 81%), likely because their competitiveness depends on providing a more personalized service. Meanwhile, larger forwarders place more emphasis on exercising judgment (32% vs. 22%) and leading organizational change (21% vs. 12%), reflecting the complexity and scale of their operations.

Which of the following human capabilities do you believe contribute most to your company's success? Select up to 3 responses.



Source: July 2025 Adelante SCM/Magaya survey of qualified and verified freight forwarders and logistics service providers. n=60 for freight forwarders that process less than 10K TEUs annually and n=47 for freight forwarders that process more than 10K TEUs annually.

Summary

The road ahead for freight forwarders will remain paved with abundant change and uncertainty -- rapidly shifting tariff policies, stricter trade compliance rules, and disruptive advancements in artificial intelligence. While many are taking meaningful steps to modernize their operations and improve efficiency, the industry faces widening gaps in AI readiness, technology investment, and customer satisfaction, particularly between smaller and larger players.

The path forward is clear: freight forwarders must evolve, not only by adopting the right technologies but also by empowering their people, strengthening customer relationships, and realigning with the outcomes their customers value most.

Recommendations for Freight Forwarders

- ▶ **Automate for Efficiency and Compliance:** Prioritize automation of documentation, compliance, and invoicing to drive internal efficiency and reduce error risk.
- ▶ **Invest in Visibility and Customer Experience:** Larger forwarders should extend their lead in real-time visibility, while smaller ones can differentiate through enhanced CRM and digital self-service tools.
- ▶ **Close the AI Readiness Gap:** Upskill teams on AI fundamentals and start with low-risk use cases to build internal capabilities and trust.
- ▶ **Realign with Shippers' Expectations:** Shift from transactional relationships to outcome-based partnerships by aligning on shared goals and KPIs.
- ▶ **Nurture Human Connections:** Amid all the tech transformation, don't lose sight of the human factor—trusted relationships remain the industry's most valuable asset.



About Adelante SCM

Adelante means “forward” or “move ahead” in Spanish. We chose this as our name because we are moving supply chain and logistics leadership forward by making it easier for industry professionals to share ideas, knowledge, and advice with each other. Our services include Talking Logistics, an online video talk show and blog featuring thought leaders and newsmakers in the supply chain and logistics industry. And Indago, a community of supply chain and logistics practitioners who are committed to sharing practical knowledge and advice with each other in a trusted and confidential manner — while giving back to charitable causes that make an extraordinary difference in lives every day. Visit adelantescm.com to learn more.

About Magaya

Magaya, the number one freight management platform for logistics service providers, is Moving Freight Forward with a Digital Freight Platform that optimizes the entire origin-to-destination supply chain through flexible, interoperable, and modular cloud-based software. Whether used together as an integrated suite or independently, Magaya solutions enable businesses of all sizes to simplify complex logistics processes, enhance the customer experience, and grow revenues alongside profits. At Magaya, we are passionately devoted to our customers' success and don't hesitate to go the extra mile. There are no limits to your growth with Magaya.

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