FREIGHTABILITY REPORT 2026

INSIDE AUSTRALIA'S B2B FREIGHT MARKET

MachShip

Freight Management, Simplified

CEO Welcome

Over the past year, the freight and logistics industry has continued to evolve at pace. Shifting customer expectations, persistent cost pressures, changing network dynamics and increasing complexity across supply chains have all shaped how freight moves across Australia and New Zealand.

At MachShip, we are uniquely positioned to observe these changes as they happen. Each day, our platform supports the movement of freight for thousands of businesses across the region, spanning a diverse mix of industries, shipment profiles and carrier networks. Collectively, this represents one of the broadest and most representative datasets of B2B freight activity in the ANZ market.

This report reflects on the previous calendar year through that lens. Rather than focusing on anecdotes or isolated trends, the insights in this report are grounded in real shipping behaviour, how freight is booked, how it moves, where performance is improving and where pressure points are emerging. By analysing this data at scale, we are able to identify patterns that are not always visible at an individual business or carrier level, but which have meaningful implications for the industry as a whole.

This year's report has also been strengthened through the contribution of industry partners who bring complementary perspectives and expertise. I would like to sincerely thank those partners who have shared insights, challenged assumptions and helped broaden the view beyond any single organisation. Collaboration across the freight ecosystem is critical and we are grateful for the willingness of our partners to contribute to a report intended to benefit the wider industry.

Our intention with this report is to contribute constructively to the freight conversation. Whether you are a shipper, carrier, logistics provider or technology partner, we believe a shared understanding of the market helps drive better decisions, stronger collaboration and more resilient supply chains.

As we look ahead, the role of technology, data and insight in freight will only become more important. The organisations that succeed will be those that move beyond visibility alone and use data to anticipate challenges, optimise performance and deliver consistently better outcomes for their customers.

I hope you find this report both informative and useful and that it provides a valuable perspective on the year that was and the opportunities that lie ahead for our industry.

Sam Rowse
CEO, MachShip

Fuel Costs Have Shifted Since This Report Was Finalised

Fuel levy movement across Australian freight carriers, March – April 2026

80%

increase in effective fuel levy in under 30 days

Effective fuel levy as a percentage of freight cost

11.3%

increase in total freight cost for shippers

Source: Carrier rate data observed across the MachShip network.

What the data shows

Since this report was finalised in late February 2026, the cost of moving freight in Australia has shifted materially. The effective fuel levy applied across carrier rates has risen from 16.6% in early March to 29.8% by early April, driven by global energy market disruption.

For shippers, this translates directly: total freight costs have increased by 11.3% in under 30 days. To put that in context, the 2025 data in this report showed parcel pricing softening by 2–4% nationally over twelve months. That entire year of pricing improvement has been reversed in weeks.

The structural trends documented in this report remain valid. Carrier performance fragmentation, regional pricing divergence, and the growing complexity of multi-carrier management are not changed by fuel price movements. In a higher-cost, more volatile environment, they become more consequential.

The full impact of these developments, including how surcharges flow through to lane-level pricing and carrier behaviour, will be a central focus of next year's Freightability Report.

Foreword

As Chair of the Australasian Supply Chain and Logistics Association, it is my pleasure to introduce the Freightability Report 2026.

This report arrives at a pivotal time for our industry. Freight across Australia and New Zealand is operating in an environment defined by volatility. The insights presented challenge many long-held assumptions and reveal where the market is and where it is headed, backed by data-led research. MachShip is to be commended on this paper and I would like to personally thank them for the partnership with ASCLA and our industry. Papers such as this move the conversation from cost alone to capability. Too often, the rate card is all that is considered in freight decisions.

Technology is our friend in a complex freight environment, not tech for tech's sake, but the intelligent use of technology can spearhead productivity and efficiency, delivering better outcomes for our customers and providing a competitive advantage. Technology, like never before, levels the playing field and is now not just for the big players. The ones who will miss out are the ones who never consider it.

For ASCLA members and the supply chain industry, this report reinforces a critical message: freight strategy can no longer rely on static contracts, legacy carrier mixes or national generalisations. Good decisions require good information.

I encourage you to read this report not simply as a reflection on the year that was, but as a tool to plan for the year ahead. In a market where complexity is rising, clarity is king.

Stephen Lakey
Board Chair,
Australasian Supply Chain & Logistics Association (ASCLA)

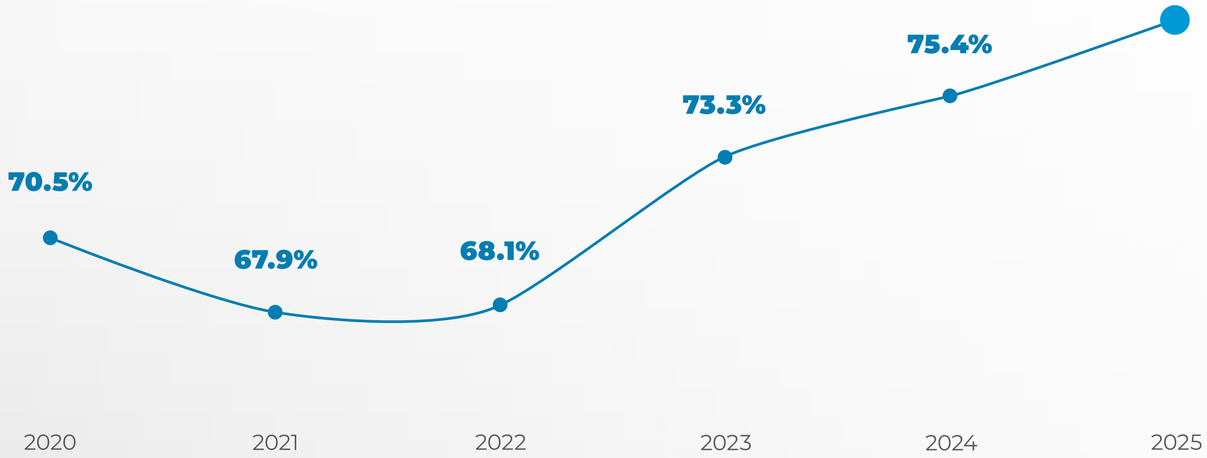
Carrier Performance

How Does Your Carrier Stack Up Against the Average?

While the top performers in the industry consistently hit high 90's DIFOT, the fragmented space of underperforming operators brings down the national average.

78%

average carrier DIFOT for 2025



Inconsistency Driven by Fragmentation

This growing gap between top-tier and underperforming carriers highlights one of the defining challenges in the ANZ freight market - performance inconsistency driven by fragmentation. While leading carriers have invested heavily in network optimisation, technology, and operational discipline, a long tail of smaller or regionally constrained operators continues to drag down the national average.

For shippers, this means "average" performance is no longer an acceptable benchmark. Businesses that rely on a single carrier or an unmanaged carrier mix are exposed to service variability that directly impacts customer satisfaction and operational costs. Conversely, organisations actively measuring DIFOT at a lane and carrier level are increasingly able to engineer performance, not just hope for it.

The data reinforces the need for carrier performance visibility and active carrier management, particularly as service reliability becomes a competitive differentiator rather than a baseline expectation.

30% of Same-Day Deliveries **aren’t on time**

Key Stats:

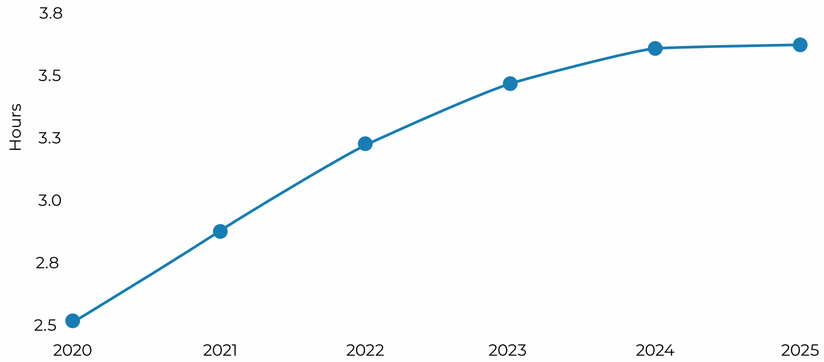
- You might be paying a premium, but almost one-third of the time your express same-day service is not delivered the same day.
- Even next-day services struggle to meet timeframes, with 27% not delivered the next day.
- Services outside the premium speed tiers perform better than the national average, with only 19% not delivered on time.
- Customers are paying more but receiving less certainty in their deliveries.

The data challenges a long-held assumption in the freight market - that premium speed guarantees certainty. In reality, same-day and next-day services are now under significant strain, driven by demand volatility, labour constraints and urban congestion.

Shippers are often paying a premium for speed, yet receiving less predictability, which undermines the value proposition of express services. Non-premium services, by contrast, benefit from greater scheduling flexibility and more resilient network planning, allowing them to outperform in on-time delivery.

This shift suggests that speed without reliability is no longer fit for purpose. Leading shippers are reassessing service selection strategies, optimising for certainty and transparency rather than headline delivery speed alone.

Same-Day Deliveries are Taking Longer on Average

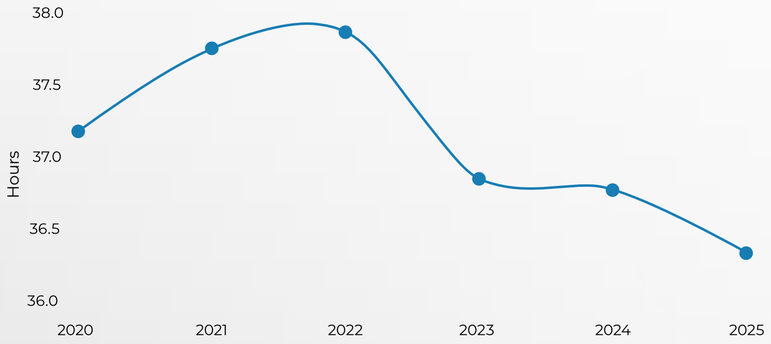


47%

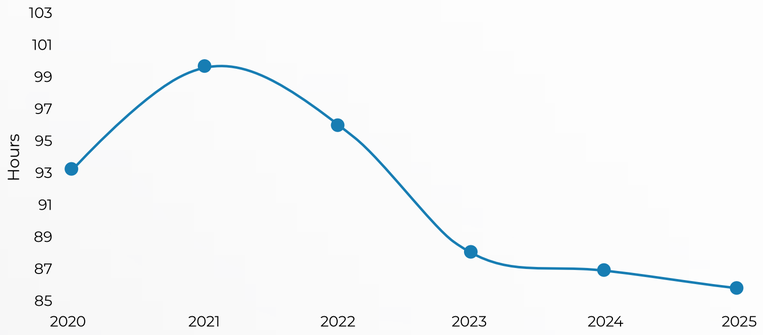
Increase in same-day delivery times over past five years

As the demand for on-demand and same-day services increases from consumers, so does the delivery time of these services. Consumers have seen a 47% increase in delivery times over the past 5 years as carriers struggle to keep up with increasing demand.

Next-day delivery times have **improved by ~3 hours**



Non-premium services have **improved by ~16 hours**



While demand for same-day delivery continues to rise, the operational reality is that these services are becoming slower and harder to deliver at scale. Urban density, driver availability and last-mile complexity are eroding the efficiency gains once associated with same-day networks.

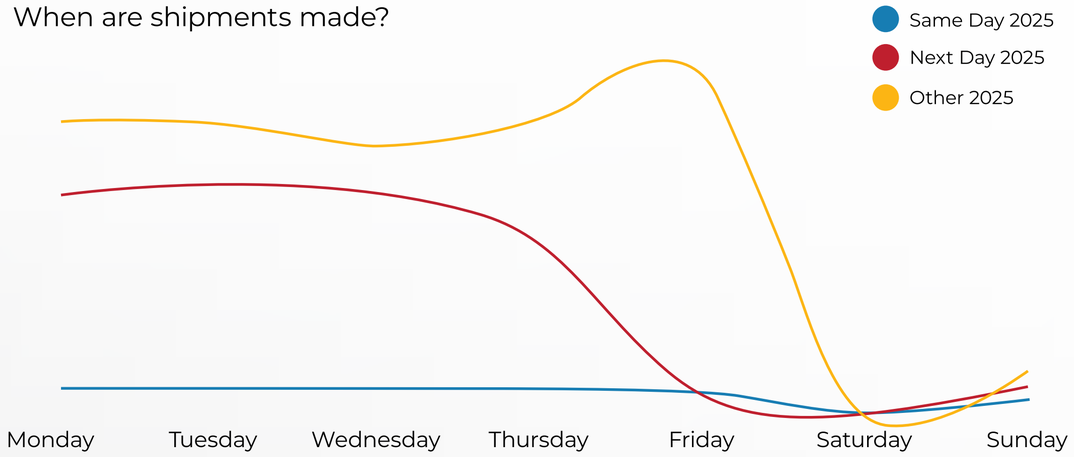
In contrast, next-day and non-premium services have benefited from network consolidation, better linehaul optimisation and technology-driven routing improvements. The result is a narrowing service gap, where slower services are getting faster while the fastest services are slowing down.

This convergence signals a structural shift in the freight market. Shippers that understand these dynamics can make smarter trade-offs between cost, speed and reliability — particularly in B2B environments where predictability often outweighs immediacy.

The Most Popular Day for Shipping is a Friday

Where premium speed services fall off a cliff on a Friday, non-premium services have their most popular day for shipping.

When are shipments made?



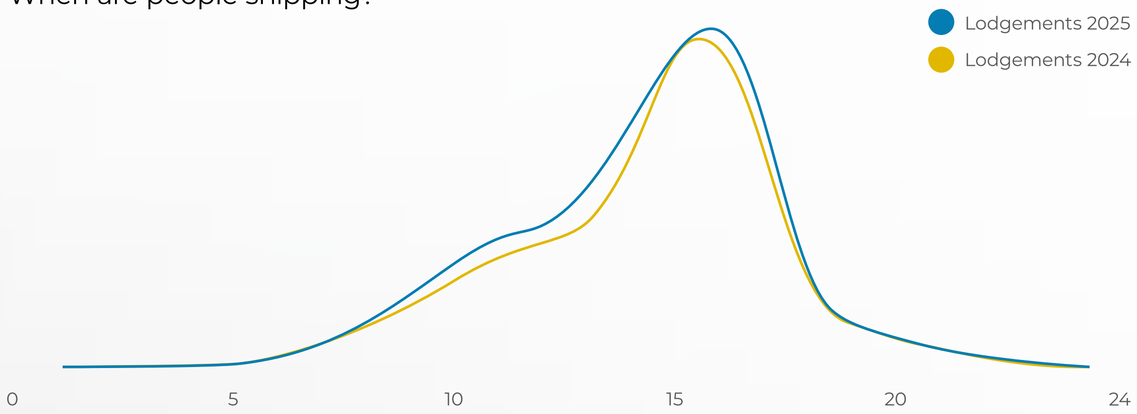
Friday shipping behaviour reflects deeply embedded warehouse and fulfilment patterns. Many businesses push volume toward the end of the week to clear inventory and meet internal cut-off cycles. However, premium services are less tolerant of these peaks, leading to reduced availability and performance drop-offs.

This mismatch highlights the importance of shipping pattern optimisation. Businesses that smooth dispatch volumes across the week are better positioned to secure capacity, improve service reliability and reduce premium service costs.

Shipments Peak at 3pm

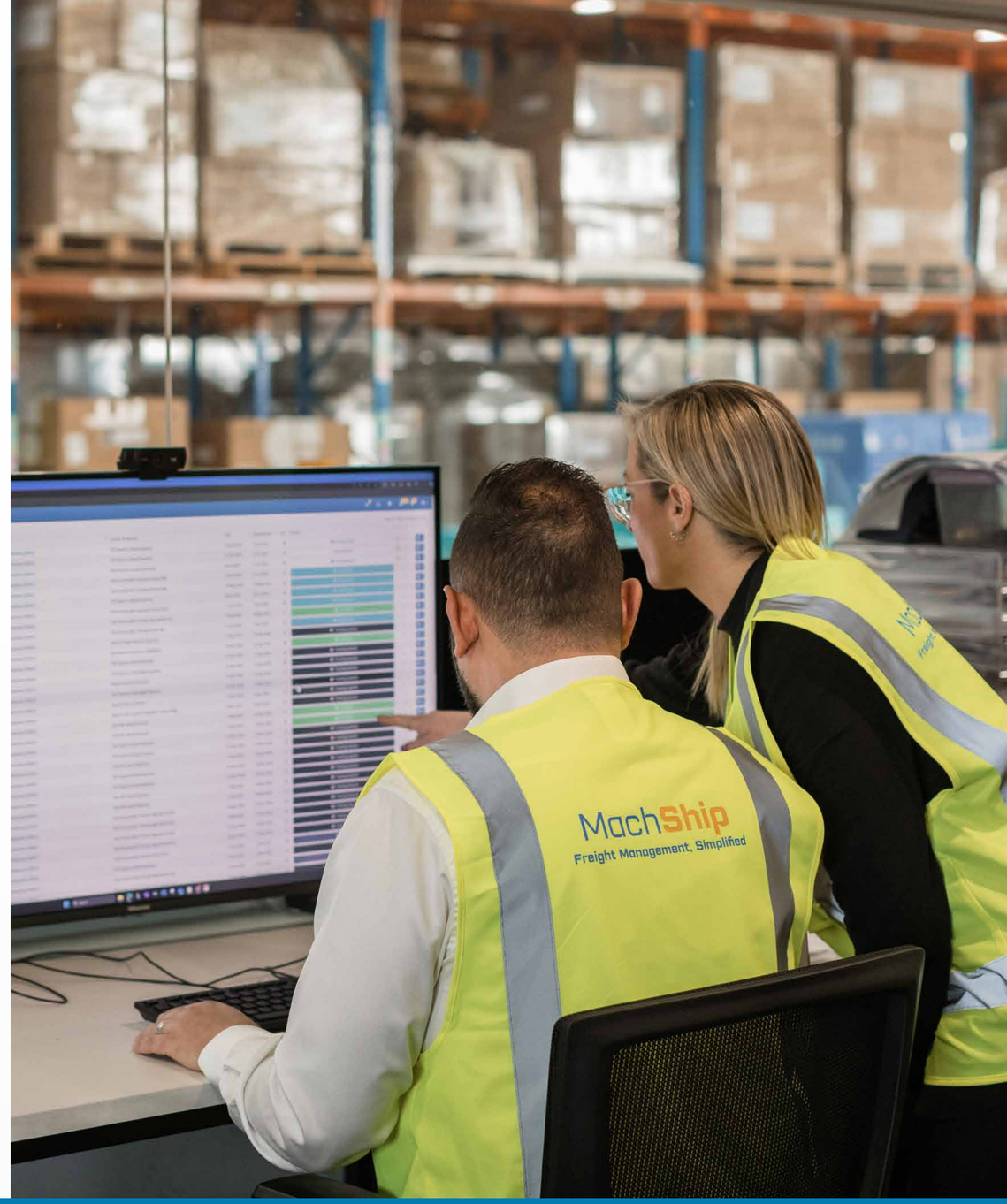
Warehouse processes continue to stay the same year-on-year. Where you may have seen people working longer to deal with demand, the shipping times don’t reflect that.

When are people shipping?



Despite increased automation and extended operating hours, warehouse dispatch behaviour remains largely unchanged. The 3pm peak suggests that operational constraints, not demand, are driving shipping times.

This creates downstream pressure on carriers and limits same-day service viability. Shippers that introduce staggered picking, earlier cut-offs, or automation-driven dispatch windows can unlock immediate performance gains without increasing freight spend.



Australian Shippers are using 5.4 Carriers on Average

Shipping in Australia is complex and there is no one carrier that can do it all.

- Different freight types require different handling and networks.
- Pricing varies significantly by mode, lane and volume.
- National reach requires multiple regional networks.
- Same-day, next-day, linehaul and last-mile demand different capabilities.

Australia's geographic scale and freight diversity make single-carrier strategies impractical. Different freight profiles, service types and regional requirements demand a multi-carrier approach.

However, carrier diversity without orchestration creates complexity. Managing pricing, performance and service rules across multiple carriers is increasingly untenable without technology support.

The data reinforces that carrier diversity is inevitable — but unmanaged diversity is optional. Shippers that centralise carrier management and decision-making gain both resilience and leverage in the market.

Typical B2B Shipper:

- Inbound containers or pallet freight into distribution centres.
- Pallets out to national distribution or wholesale networks.
- Parcel shipments to end customers or retail locations.
- Multiple carrier networks required across metro, regional and rural Australia.

National Parcel Market

Median Parcel Price from Main Shipping Lanes

Origin	Melbourne	Sydney	Brisbane	Perth
Melbourne	$8.51	$12.55	$13.69	$15.92
Sydney	$13.52	$8.85	$14.13	$17.90
Brisbane	$15.64	$13.97	$7.70	$18.61
Perth	$14.85	$15.98	$16.95	$8.00

This table provides a snapshot of median parcel pricing across the four largest shipping corridors in Australia, capturing the typical cost of moving a parcel between major capital city lanes. The data highlights both the relative cost differences between lanes and an overall downward shift in pricing across the network, with average reductions of ~2–4% across Melbourne, Sydney, Brisbane and Perth from 2024.

Key Insight: National parcel prices are trending down

The average price changes by origin show consistent downward pressure.

MEL Avg Change ↓ **2.94%**

BNE Avg Change ↓ **2.91%**

SYD Avg Change ↓ **2.38%**

PER Avg Change ↓ **4.15%**

This suggests a broad market trend — not isolated changes on individual lanes.

Pricing softness across multiple corridors typically occurs when carriers are actively competing for volume, capacity exceeds demand in key lanes, or shippers have more leverage in rate negotiations.

For B2B shippers, this creates an opportunity to reset carrier rate structures and review whether current pricing reflects market benchmarks.

Parcel pricing has softened across every major Australian corridor, with median pricing down between 2–4% across all capital city lanes. This signals increased competition and improved shipper leverage — particularly in the high-volume east coast network.

What the lane pricing tells us

Metro lanes remain the lowest-cost.

Same-city shipments (e.g., Melbourne → Melbourne, Sydney → Sydney) are materially cheaper than interstate lanes. This reflects:

- Shorter distance
- Simpler delivery orchestration
- Better carrier density
- Higher efficiency in metro delivery networks

East coast interstate lanes remain the core battleground

Melbourne ↔ Sydney ↔ Brisbane corridors represent the most competitive routes due to:

- High freight volumes
- Multiple carrier options
- Frequent linehaul movements

These lanes tend to experience the most pricing pressure, as carriers prioritise volume, retention and growth.

Perth remains the most expensive interstate destination

Perth continues to command premium pricing across most origin lanes (e.g., Melbourne → Perth $15.92; Sydney → Perth $17.90; Brisbane → Perth $18.61). This reflects:

- Long-haul distance and linehaul cost
- Fewer carrier alternatives
- Network imbalance (inbound vs outbound)
- Higher operating costs

Interestingly, Perth also shows the largest average decrease (↓4.15%), indicating that despite premium pricing, carriers may be applying stronger discounting to maintain share or stimulate demand on west coast routes.

What's driving downward pricing pressure across lanes?

Several structural and market factors can contribute to widespread pricing decline like this:

1. Heightened carrier competition

   Carriers competing for large contracted volumes often apply aggressive discounting, particularly on high-volume east coast corridors.

2. Network optimisation and density improvements

   As carriers improve route planning, consolidate depots and optimise interstate movement, cost-to-serve declines — allowing more competitive pricing.

3. Shipping volume stabilisation

   After years of volatility, many carriers have moved into a phase of balancing yield and utilisation.

   If demand softens, carriers tend to lower prices to protect utilisation.

Improved shipper visibility and procurement maturity

Shippers increasingly have:

- Lane-level benchmarking
- Performance dashboards
- Real-time freight analytics

This increases pricing transparency and reduces carriers' ability to maintain inflated lane rates without justification.

Implications for shippers

This trend is positive for B2B shippers — but only if it is actively captured.

Opportunity: Review carrier contracts.
Many organisations operate on legacy rate cards that don't reflect market changes. This data supports renegotiation or carrier reallocation.

Opportunity: Optimise lane allocation.
With lane-level visibility, businesses can assign carriers based on:

- Price competitiveness
- Performance reliability
- Capacity consistency

This is as opposed to using a "one carrier for all" strategy.

Risk: Pricing can improve while service degrades

In periods of aggressive discounting, service performance can be impacted if carriers are operating under margin pressure. Shippers should balance price trends against DIFOT and delivery reliability metrics.

National Pallet Market

Median pallet prices (ex GST, incl. fuel levy) across major capital city lanes provide a current benchmark of intercity freight costs.

Origin	Melbourne	Sydney	Brisbane	Perth
Melbourne	$41	$109	$165	$232
Sydney	$97	$47	$118	$257
Brisbane	$108	$92	$46	$240
Perth	$114	$131	$158	$41

National Pricing Movement (YoY)			National Demand Movement (YoY)		
Melbourne	↓	0.2%	Melbourne	↓	4.1%
Sydney	↓	1.0%	Sydney	↑	8.2%
Perth	↓	5.5%	Perth	↓	16.0%
Brisbane	↑	7.8%	Brisbane	↑	5.7%

Across most capital city lanes, average pallet prices have softened modestly, indicating easing competitive pressure or improved network efficiency.

However, Brisbane breaks the national trend.

While Melbourne and Perth reflect softening conditions aligned with demand movements and Sydney demonstrates rising demand alongside lower pricing, Brisbane shows rising demand and rising prices.

This divergence between demand and pricing highlights how capacity availability and carrier competition shape outcomes at the local level.

Sydney's ability to absorb increased volume while lowering prices suggests healthy competition and network depth. In contrast, Brisbane's rising pricing and demand metrics point to structural constraints rather than cyclical fluctuations.

These movements signal that pallet pricing is not nationally uniform, and that localised market dynamics, rather than broad inflationary pressure, are driving outcomes.

Rising Prices + Rising Demand = Structural Constraint

Brisbane's pallet market shows:

- Demand up +5.7%
- Prices up +7.8%

This dual increase is an important red flag. In competitive freight markets, rising volume typically exerts downward pressure on price. When price rises alongside demand, it usually indicates:

- Constrained carrier capacity
- Infrastructure bottlenecks
- Labour shortages
- Sustained inbound freight imbalances

The consistency of Brisbane's upward pressure across parcel, pallet and demand metrics suggests these forces are structural rather than cyclical.

Strategic Interpretation

Brisbane appears to be operating close to (or beyond) its efficient freight capacity. Shippers relying heavily on Brisbane-centric distribution should expect:

- Continued pricing pressure
- Tighter carrier availability
- Increased risk of service degradation during peak periods

A Healthy Competitive Market Signal

Sydney presents a contrasting profile:

- Pallet demand up +8.2%
- Pallet prices down −1.0%

This divergence indicates:

- Strong carrier competition
- Deeper network density
- More flexible capacity absorption

Sydney's ability to absorb increased volume while reducing price suggests a healthy, competitive market with multiple carrier options and resilient infrastructure.

Strategic Interpretation

Sydney remains a favourable market for:

- Renegotiating pallet rates
- Reallocating volume across carriers
- Absorbing overflow from other constrained regions

Stable Pricing, Declining Demand

Melbourne's data shows:

- Demand down −4.1%
- Prices marginally down −0.2%

This indicates:

- Relatively balanced market
- Limited pricing pressure in either direction
- Stable carrier capacity relative to demand

Melbourne appears to be in a holding pattern, with no immediate volatility but also limited opportunity for significant price compression without further demand changes.

Strategic Interpretation

Melbourne remains a balanced and stable pallet market, with limited volatility but also limited immediate upside.

- Demand softness has not translated into pricing pressure, indicating disciplined carrier capacity management
- The market is operating in equilibrium, with supply closely aligned to reduced demand
- Any material price movement will likely require a broader recovery in industrial or retail volumes

Demand Collapse Drives Price Softening

Perth stands out with:

- Demand down −16.0%
- Prices down −5.5%

This sharp demand contraction is likely linked to:

- Reduced inbound freight
- Project slowdowns
- Broader economic softening affecting west coast flows

The price response suggests carriers are actively discounting to maintain utilisation, reinforcing Perth's historical volatility as a swing market driven by demand cycles.

Strategic Interpretation

- While Perth pricing is currently favourable, it remains highly sensitive.
- Shippers should expect pricing volatility to return quickly if demand rebounds.

What This Means for Shippers

Pallet pricing is not nationally uniform

Market conditions vary significantly by state and lane. National averages hide meaningful local dynamics.

Demand alone does not determine price

Brisbane and Sydney demonstrate opposite outcomes with rising demand — highlighting the importance of capacity depth and carrier competition.

Structural constraints require strategic response

In constrained markets (e.g. Brisbane), shippers should:

- Diversify carrier mixes
- Secure committed capacity earlier
- Explore consolidation and mode-shifting
- Actively monitor performance and pricing signals

Dynamic carrier allocation is no longer optional

The divergence between markets reinforces the need for lane-level pricing intelligence and dynamic carrier allocation, particularly as volatility increases.

The pallet market will increasingly reward shippers who:

- Actively monitor lane-level conditions
- Rebalance carrier volume dynamically
- Integrate pricing, demand and performance data into freight decision-making.

Pallet pricing is increasingly shaped by local capacity and network depth rather than national trends. Brisbane's rising prices alongside increasing demand point to structural constraints, while Sydney's ability to absorb volume growth at lower cost highlights the value of competition and carrier diversity.

Average Full Truck Load Price

Prices ex GST, including fuel levy

Origin	Melbourne	Sydney	Brisbane	Perth
Melbourne	$712	$1,895	$4,454	$9,799
Sydney	$1,601	$391	$2,322	$12,168
Brisbane	$2,990	$2,269	$578	$12,334
Perth	$3,178	$3,916	$5,557	$777

FTL pricing is under renewed pressure as demand rebounds and capacity remains tight on long-haul lanes. Perth's volatility reflects its geographic isolation and sensitivity to demand spikes.

As FTL costs rise, shippers are increasingly exploring consolidation, mode-shifting and hybrid service models to control spend. Visibility into lane-level pricing and demand trends is becoming critical for strategic freight planning.

12.48%

INCREASE

IN AVERAGE FTL PRICE YOY

Strong price increases across all lanes. Perth routes have high variances in pricing driven by demand.

Service Reliability: Improvement at the Average, Variation at the Edge

The data shows DIFOT improving, but performance is uneven

Carrier DIFOT has climbed to ~78% nationally, but top performers remain in the high 90s — meaning the market is increasingly separating into two tiers.

Strategic interpretation

This is not a temporary cycle
— it reflects a structural shift:

- Larger carriers are achieving performance gains through network optimisation, automation, scanning discipline and operational visibility.
- Smaller or regional operators are constrained by labour availability, fleet limitations, depot coverage and technology gaps.

In 2026, this separation will become more pronounced. Shippers will increasingly select carriers based on measured reliability, not just rate. In markets with rising consumer expectations (even in B2B), reliability is becoming a competitive differentiator rather than a baseline expectation.

2026 Outlook

Expect:

- A continued rise in DIFOT for leading carriers through routing technology and operational investment.
- Greater volatility and risk in the long tail, especially in regional and outer metro lanes.
- More shippers adopting multi-carrier allocation strategies to protect service performance.

Premium Delivery Services: “Speed” is Becoming Less Valuable without Certainty

The data shows same-day and next-day services are not meeting expectations

- 30% of same-day deliveries aren’t on time
- 27% of next-day deliveries miss SLA
- Non-premium services outperform premium services on reliability (19% not on time).

Strategic interpretation

Premium services are facing their biggest challenge - they’re increasingly expensive, but not consistently predictable. This directly reduces the value proposition of express delivery. In the B2B context, most customers don’t want “fast” - they want reliable.

The report data supports a growing trend - shippers should optimise for certainty and transparency, not headline speed. Particularly for time-sensitive goods where missed SLA creates downstream cost (labour rework, missed windows, customer dissatisfaction).

2026 Outlook

Expect:

- More shippers will redesign service menus with fewer express defaults, more “reliability tiers.”
- Carriers will introduce clearer SLA and premium pricing models tied to certainty, not speed.
- Demand for “same-day” will remain high, but successful providers will be those who invest in last-mile density and orchestration.

Same-Day Delivery is Slowing: The ‘Service Gap’ is Narrowing

The data shows same-day times have increased 47% over five years

- Same-day delivery times ↑ 47%
- Next-day improved by ~3 hours
- Non-premium improved by ~16 hours

Strategic interpretation

This is one of the most important signals in the report because it shows the market is shifting structurally.

Same-day delivery is becoming harder to deliver at scale due to:

- Metro congestion
- Driver scarcity
- Operational complexity

Meanwhile, next-day and non-premium networks have improved due to better linehaul optimisation and consolidated routing. This means the speed advantage of same-day is shrinking — so decision-making must increasingly weigh reliability and cost.

2026 Outlook

Expect:

- Continued improvement in non-premium services as carriers refine networks.
- Same-day shifting toward a “metro-only” service for dense customer zones.
- More hybrid services emerging (e.g., “overnight + time window”) as a middle ground.

Shipping Behaviour: Warehouse Processes are Still Driving Network Inefficiency

The data shows Friday is the peak shipping day, shipments peak at 3pm

- Friday remains the most popular shipping day, especially for non-premium services.
- Premium services “fall off a cliff” on Friday.
- Shipment activity peaks at 3pm consistently year-on-year.

Strategic interpretation

This is a classic example of shipper behaviour driving carrier performance and cost outcomes.

The freight market isn’t only constrained by carriers — it’s constrained by shipper fulfilment patterns.

Friday peaks overload networks and amplify risk:

- Capacity shortages
- Missed pickups
- Depot congestion
- Longer transit times

The 3pm dispatch peak indicates many warehouses are not shifting behaviour even with extended operating hours — meaning operational constraints, not demand, are shaping freight flows.

2026 Outlook

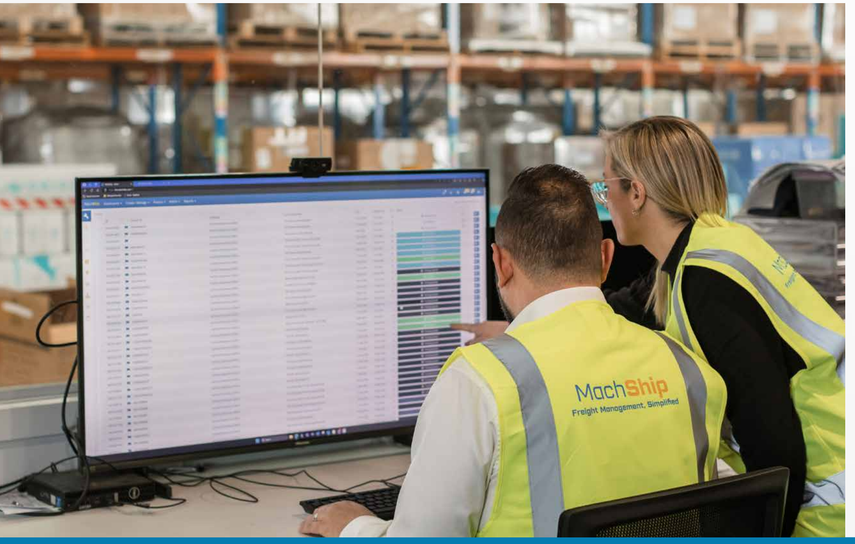
Expect:

- Carriers will apply more dynamic pricing and surcharges for end-of-week peaks.
- Shippers that smooth dispatch volumes will achieve measurable performance advantages.
- Adoption of automated dispatch windows and staggered picking will become a major lever for competitive advantage.

Multi-Carrier is Now the Standard — but Orchestration is the Differentiator

The data shows shippers use 5.4 carriers on average

This reflects Australia's freight reality - geographic scale, service diversity and varied freight profiles mean single-carrier strategies are impractical.



Strategic interpretation

Carrier diversity is inevitable.
But unmanaged diversity is expensive.

In 2026, the competitive advantage will belong to organisations that:

- Centralise carrier management
- Measure performance lane-level
- Allocate volume dynamically
- Use technology to control rules, service selection and exception workflows

2026 Outlook

Expect:

- Further growth in multi-carrier strategies, especially among mid-market shippers.
- Increased focus on "carrier mix optimisation" as a core procurement and operations discipline.
- More carriers offering differentiated service "bundles" to hold volume.

Pricing: Parcel Softness vs Freight Inflation is Reshaping Cost-to-Serve

The data shows:

- Parcel pricing is trending down (2–4% decreases across major lanes)
- Pallet markets softened overall, but Brisbane continues upward pressure (price and volume growth)
- FTL prices increased 12.48% overall, with Perth volatility driven by demand

Strategic interpretation

This split is important:

- Parcel networks are competitive and improving, driving price softness.
- Linehaul and long-haul capacity remains constrained, driving upward pressure in pallet and truckload markets — especially where capacity is unbalanced (Perth and Brisbane).

This means shippers should not rely on “freight cost inflation” or “freight cost decline” narratives. The reality is lane-specific and mode-specific.

2026 Outlook

Expect:

- Continued parcel price competition in dense corridors.
- Upward pressure on long-haul freight as fuel, labour and capacity constraints persist.
- Brisbane likely remains a hotspot due to infrastructure pressure and inbound demand growth.
- Growing adoption of consolidation and mode shifting (e.g. moving parcel-to-pallet where possible).

The Rise of B2B Marketplaces

As digital transformation accelerates, the B2B ecommerce sector is undergoing a period of rapid expansion and reinvention. Global B2B ecommerce is projected to grow at a compound annual rate of 20.2% through 2030, reaching over USD 52 trillion, while Australia's B2B online sales are forecast to double by 2030 (source: Mordor Intelligence). This evolution is being fuelled by rising buyer expectations, the demand for operational efficiency and the convergence of digital commerce with logistics and freight systems.

In this commentary, Commerce will explore the major trends shaping modern B2B ecommerce and highlight how manufacturers, wholesalers and distributors across ANZ are digitising their customer experience to drive loyalty, reduce friction and compete globally.

Supply chain and fulfilment transparency are central to the B2B experience

As order volumes and complexity rise, integration between ecommerce and freight management platforms has become critical. Businesses are turning to connected technologies like ERP ecommerce integrations to automate logistics workflows and reduce manual overhead.

Supply chain transparency is now a buyer expectation: customers want real-time visibility into stock availability, shipping costs and delivery timelines within the same buying experience.

Insights by

Commerce™

B2B ecommerce is projected to **grow** at **20.2% CAGR** through 2030, reshaping buyer expectations and operating models.

Insights by

Commerce™

The New Buyer Journey: Digital-First, Self-Service, Always-On

74% of B2B buyers now transact online and 50% purchase weekly, demanding a frictionless experience with personalised pricing, tailored catalogues and easy reorder tools (source: BigCommerce The Global B2B Buyer Behavior Report).

The rise of self-service portals, quote management tools and custom catalogues empowers buyers to manage their own accounts which enhance speed and loyalty while lowering sales cycle costs.

Efficiency and Automation Drive Scale

Businesses integrating ecommerce with ERP, CRM and freight systems are seeing significant gains in order accuracy, processing speed and operational visibility.

Automated data syncing and real-time inventory updates reduce stockouts and freight errors, which in turn strengthens customer confidence and supply chain resilience.

Personalisation and Loyalty are the New Competitive Edge

B2B buyers expect the same level of personalised, intuitive experiences that B2C shoppers demand. Companies that use data to tailor catalogues, pricing and content see measurable improvements in conversion and retention.

Loyalty in B2B extends beyond discounts. Successful brands are building value-based programs that emphasise sustainability, partnership and shared growth goals.

New-to-Online Businesses are Accelerating Digitisation

Many ANZ manufacturers and wholesalers are only now adopting ecommerce, often driven by supply chain volatility and customer demand for digital ordering.

For these businesses, success depends on building a strong foundation:

- Starting with a scalable, composable platform rather than custom builds
- Leveraging integration-ready systems (ERPs, CRMs, freight software)
- Adopting a crawl-walk-run approach to digital maturity, guided by trusted ecommerce partners

Building Supply Chain Resilience in 2026: How Multi-Modal Networks Enable Continuity, Agility and Efficiency

Insights by

TEAM GLOBAL EXPRESS

B2B freight and supply chains across Australia and New Zealand are operating under fundamentally different conditions than a decade ago. Over the past five years, Australia has experienced more than $22.5 billion in insured losses from extreme weather (a 67% increase on the previous period), with a 2024 parliamentary review concluding that “national-scale crises are becoming annual occurrences” and 84% of Australians reporting being affected by at least one climate-related disaster .

Traditional freight strategy optimised on cost per lane assumes stable operating conditions. That assumption no longer holds. When operations are interrupted, significant hidden costs can emerge in the form of emergency response fees, recovery charges, stockouts and customer dissatisfaction.

The organisations gaining competitive advantage are rebuilding freight strategy around three strategic capabilities: **continuity** when infrastructure fails, **agility** when demand shifts and **efficiency** across cost and carbon.

84% of Australians report being **affected** by at least one **climate-related disaster**, making network resilience a core operating requirement, not a contingency plan.

Insights by

TEAM GLOBAL EXPRESS

Continuity: When Infrastructure Fails

Climate scenario analysis conducted by Team Global Express in 2024-2025 identified significant physical risks to key Australian infrastructure and assets posed by increasing weather events such as heatwaves, bushfires, flooding and cyclones.

Three corridors emerged as particularly exposed:

The Nullarbor corridor: Bushfire seasons can close the primary road link between eastern states and Perth for extended periods.

The East-West rail corridor: Flooding can wash out track sections, halting rail freight across the country.

Far North Queensland routes: Cyclones and flooding can simultaneously affect multiple transport modes.

Australian geography and increasing weather variability create scenarios where single-corridor or single-mode reliance creates measurable business continuity risk.

Case study: Tropical Cyclone Alfred Response

When Tropical Cyclone Alfred cut all surface transport into Cairns in February 2025, Team Global Express worked with government agencies to rapidly mobilise a dual solution via

a) Air: Nine charter flights were organised within 24 hours to deliver 180 tonnes of emergency provisions

b) Road: 2 B-doubles and 1 semi-trailer were organised simultaneously at 3:00am to transport 125 pallets of critical supplies to support Brisbane flood mitigation.

Industry application: Assess your freight exposure to corridor-specific disruption and ensure multi-modal infrastructure in your continuity plan is available and operational before crises occur. Ready access to alternative transport capacity, operational depot networks, regulatory clearances and established protocols enable rapid mode-switching.

Insights by

TEAM GLOBAL EXPRESS

Agility: When Demand Shifts

EOFY, Christmas and seasonal events now generate volume surges that exceed standard transport capacity across industries.

Single-mode freight strategies expose organisations to increased risk of service degradation or payment of significant premium freight costs to secure additional capacity through spot market arrangements.

Case study: COVID-19 Emergency Response

During the pandemic, Team Global Express re-directed time-critical deliveries across its network including road and air, to ensure PPE and medical supplies were distributed across Queensland, completing most movements overnight despite unprecedented demand surges in challenging conditions.

Case study: National elections

Since 2019, Team Global Express has partnered with the Commonwealth government to support the national elections with tightly integrated air and ground runs that ensure sustained national delivery performance under zero-tolerance deadlines and strict chain-of-custody protocols.

Industry application: Forecast your peak periods and confirm your freight partner has scalable capacity through alternative modes and partner networks that flex with demand. Pre-position capacity across modes to absorb volume surges cost-effectively overall.

Efficiency: Optimising Cost and Emissions

Many organisations face dual pressure on freight efficiency: managing costs while meeting increasingly stringent sustainability targets and reporting requirements.

Multi-modality can help enhance cost efficiency by mapping transport modes to freight characteristics to balance speed and cost.

Insights by

TEAM GLOBAL EXPRESS

Rail provides cost-effective bulk movement for predictable volume with transit flexibility. Road delivers door-to-door service for distributed networks requiring frequency and flexibility. Air accelerates time-sensitive freight when urgency justifies premium service.

Team Global Express conducts Scope 1 and 2 emissions reporting to support customers' Scope 3 freight emissions reporting at consignment-level, enabling transparency and evidence-based decision-making.

Case study: Supporting Regional Healthcare

Team Global Express operates 500+ weekly flights including 400 regional services with dual daily touch points serving hospitals, medical centres, pathology facilities and pharmacies across metro and remote Australia. The network ensures time-critical healthcare freight (life-saving medicines, surgical equipment, pathology samples, organ deliveries) reaches communities regardless of location, supporting healthcare wholesalers' Community Service Obligations including full PBS medicine availability to regional pharmacies. This permanent infrastructure maintains healthcare connectivity when road and rail cannot meet time-critical requirements.

Industry application: Effective optimisation depends on visibility. Work with your freight provider to obtain emissions data, enabling informed decisions about emissions and cost. Multi-modal capability enables matching freight characteristics to appropriate modes: rail for cost-effective bulk movement, road for distributed delivery and air for time-critical freight or remote locations where surface transport is uneconomical.

For C-suite and supply chain leaders, the opportunity is shifting from evaluating freight purely on cost per lane to assessing strategic capability across continuity, agility and efficiency as operating conditions become more volatile.

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Recommerce is Reshaping Returns — and the Supply Chain is Feeling it

Recommerce is moving from a niche sustainability initiative to a practical commercial lever. As retailers mature their circular strategies, the biggest change is not the resale channel itself — it's what recommerce does to logistics: more decision points, more touches, more tracking events and a materially more complex flow of goods.

In Australia, most retail returns still behave like waste: a reverse shipment back to a central facility, a slow assessment cycle and then an opaque outcome (write-off, liquidation, or a costly rework path). That model is increasingly misaligned with the economics and the service expectations that underpin recommerce.

Why the shift is happening

Returns volumes alone justify a rethink. In many markets, returns represent roughly 15–20% of parcel flows and retailers have limited room left to absorb the combined cost of transport, processing, shrink and delay[1]. Where recommerce programs are operationalised at scale, structured triage and resale workflows can materially increase value recovery versus traditional returns pathways[2].

In the US, specialists such as Inmar have demonstrated what "industrialised" reverse logistics can look like, operating large-scale networks that integrate intake, triage and downstream disposition at high volume[3].

Insights by

HUBBED

Two or more transport legs are now common in recommerce flows, **increasing** B2B **complexity**, cost and tracking demands.

Insights by

HUBBED

The hidden B2B burden behind recommerce

Recommerce is often described as a consumer returns problem, but the volume and complexity it creates sits heavily inside the B2B network. Once an item leaves the consumer, it frequently becomes a multi-leg, multi-party movement problem with cost and risk at each hand-off.

- Two (or more) transport legs are common: consumer-to-retailer, then retailer-to-repair/refurbishment or secondary-market partner; and in some models an additional leg back to a resale fulfilment site.
- Tracking fragmentation increases: each leg can generate a new consignment, label and tracking ID, creating reconciliation work across WMS/OMS/returns platforms and carrier billing.
- Higher exception rates: unknown condition, missing components, or contamination (e.g. cosmetics) drive higher manual intervention and claims management, which is disproportionately expensive in B2B workflows.
- Inventory latency becomes a working-capital issue: value decays while items sit in transit or queues for assessment; the longer the cycle time, the higher the write-down risk.
- Cost-to-serve is often underestimated: beyond linehaul, the true cost includes handling, sorting, storage, technician time, QA, compliance checks (e.g. batteries) and administration across multiple counterparties.

The net effect is that recommerce can drive more parcels and more touches through B2B lanes even when consumer demand is flat. For carriers and 3PLs, this shows up as: greater variability in origin/destination pairs, more time-sensitive exception handling and increased demand for scan-rich services and custody controls.

Insights by

HUBBED

What an efficient recommerce logistics backbone looks like

High-performing recommerce systems reduce cost and emissions by eliminating unnecessary legs and compressing decision time. Operationally, that requires three capabilities:

- Dense, consumer-proximate intake points to increase capture rates and reduce first-mile friction.
- Consistent intake workflows and data capture (item ID, reason codes, photo/condition signals where relevant) so items can be routed based on value, not just destination.
- Consolidation and value-based routing that can send items directly to the right destination (repair, refurbishment, liquidation, donation, or resale fulfilment) rather than defaulting everything back to a central retailer DC.

This is where Out-of-Home (OOH) networks can play a structural role: they provide a standardised intake layer, improve consolidation economics and enable faster triage decisions. A network like Hubbed's PARCELPOINT footprint can be used as the front-end capture and consolidation layer, while downstream partners (repairers, refurb hubs, recommerce platforms and 3PLs) handle the value-add work.

Implications for retailers and logistics providers

For retailers, recommerce is less about launching a resale storefront and more about designing a supply chain that treats returned stock as recoverable inventory. For logistics providers, it is a growth vector — but only if services evolve to handle the scan density, exception management and multi-leg routing that recommerce introduces.

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What Australia's 2025 Container Trade Means for Freight

Despite Australia being a country rich in natural resources such as grain, dairy and livestock, (which make up a large portion of our container exports), we are overwhelmingly an import nation. Typically, at a 2:1 ratio of imports to exports.

Based on the latest data from major ports in 2025[1] we saw container exports outperform imports by a gap of 3.7%. This reduces the ratio for 2025 down to 1.96 to 1, which shows that exports performed well and, although imports increased, they were stagnant by comparison.

What does this imbalance mean?

As mentioned, this does not mean that our container imports have not grown; rather, they have been outpaced by the growth in exports. To better understand why this is the case, we need to look at the drivers behind the import and export of containers to and from our country.

Australia's container exports are largely driven by industrial and agricultural outputs, including the natural resources mentioned above. Grains, dairy and livestock are all inputs used to fuel the production of non-discretionary essential goods. These will help feed the people of our key trading partners, which isn't really optional and will grow in correlation with the agricultural needs of our buyers.

Conversely, imports into our country largely consist of discretionary items, including apparel, shoes, electronics, toys and books. These goods may be perceived as less essential and are therefore subject to fluctuations in consumer confidence and purchasing power.

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Navia

Exports grew **5.2%** in 2025, outpacing **import** growth of **1.5%**, signalling a rebalancing economy and a shift toward more measured freight demand.

Insights by

Navia

Why import growth lagged

Roy Morgan analyses consumer confidence on a weekly basis as part of its research and this data reflects that consumer confidence ended the year 6 points lower than it was at the start of the year.[2]

This is impacted by a range of factors, with interest rates and inflation being two such factors. Inflation was trending down for the first half of the year, after which it spiked again in July.[3] Consequently, interest rates were cut several times, boosting confidence early in the year and then were put on hold in October, aligning with the trend in inflation.[4]

When considering exports, however, they are shielded from these factors and more driven by the resource needs of our trading partners, thus, showing stronger growth than imports.

What does this mean for road freight?

Ultimately, the impact of container trade changes will flow through to road freight, particularly in how goods flow domestically. Specifically, slower container imports translates to slower movement or growth in consumer goods. This is both from the perspective of growth in B2B trucking between warehouses or distribution centres, as well as growth in final mile parcel deliveries.

For bulk road freight or linehaul, volume growth will continue into 2026, but if the 2025 trend continues, we may see fewer incremental volume increases than in export commodities or goods.

Furthermore, those road freight operators who service the agricultural, dairy and meat industries may see a more predictable growth and be somewhat insulated compared to those that service B2C businesses.

Insights by

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Parcel freight would tell a similar story, in that soft consumer confidence may impede growth, with the caveat that, as consumer buying continues to shift towards e-commerce, existing bulk store-to-store volumes could be redirected into the parcel networks will likely reflect what we see in road freight. Those road freight carriers who service exporters and who have the capacity to carry full containers or truck loads of goods such as minerals, oil, grain or dairy products will be insulated from consumer demand.

Summary

In conclusion, the gap between container imports and exports in 2025 reflects a broader rebalancing in the Australian economy. Export growth has remained resilient, supported by stable global demand for essential Australian outputs, while import growth has softened in line with more cautious consumer behaviour.

For freight and logistics operators, this points to a year ahead defined less by rapid volume growth and more by measured demand, tighter margins and the need for sharper decisionmaking.

Understanding the drivers behind these trends will be critical for anticipating where freight volumes will grow, where they will plateau and how best to respond as conditions evolve into 2026.

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AI in B2B Freight: From Visibility to Foresight

For the past decade, the freight industry has focused on building visibility. Track and trace, realtime status updates, carrier integrations and centralised freight platforms have fundamentally changed how businesses manage logistics. These capabilities answered a critical operational question: “Where is my freight?”

Today, that level of visibility is no longer a differentiator, we see it as table stakes.

As the industry looks toward 2026 and beyond, the question shaping competitive advantage has shifted to something more forward-looking: “Will this shipment arrive on time and, if not, what can we do about it now?”

This shift marks the transition from reactive freight management to predictive, AI-enabled decision-making.

From Reactive Monitoring to Proactive Intervention

Traditional freight systems are excellent at reporting what has already happened. AI is changing that by enabling businesses to anticipate outcomes before issues occur.

Leading freight organisations are now using AI models to assess delivery risk at the point of booking, scoring consignments based on factors such as:

- Historical lane performance
- Carrier reliability
- Service level selected
- Lead time compression
- Shipment timing

Insights by

SPARROW XPL

6.5% of freight movements are **AI-managed** today, with rapid adoption expected in 2026.

Insights by

SPARROW XPL

Rather than treating every shipment as equally risky, AI allows operations teams to focus on the up to 22% of consignments most likely to miss SLA, dramatically improving efficiency and service outcomes.

The insights behind these predictions are not new. The industry has long known that lane performance and lead time matter. What has changed is the ability to:

- Evaluate risk consistently
- Apply it across thousands of daily shipments
- Surface actionable insights in real time

Intelligence Embedded Across the Freight Lifecycle

The true value of AI in B2B freight is not limited to prediction alone. Its impact increases when intelligence is embedded across the entire freight lifecycle.

At booking

AI-powered pricing and service recommendation engines can evaluate:

- Carrier rate cards
- Zone mappings
- Historical delivery performance
- Capacity signals

Instead of defaulting to the cheapest or fastest option, these systems recommend services that balance cost, reliability and delivery probability, supporting better commercial and customer outcomes.

During transit

AI-driven monitoring systems can continuously assess live shipment data and raise alerts only when intervention is likely to add value.

Combined with natural language interfaces, operations teams can now ask questions such as:

- Which carriers are performing best to regional Queensland this month?
- Which consignments are most at risk today?
- Where are delays trending compared to last week?

What once required manual reporting and analyst time can now be answered instantly, with databacked confidence.

Post-delivery

After delivery, AI enables automated performance analysis by:

- Carrier, lane, postcode, service type and customer segment.

This turns historical consignment data into actionable insight, supporting:

- Carrier mix optimisation, contract renegotiation, network design decisions and continuous improvement conversations.

Understanding the Trade-Offs

Proactive freight management is not without cost.

Predictive systems will inevitably flag some shipments that would have arrived on time without intervention. However, for B2B shippers and logistics providers where customer experience, retention and SLA performance matter, the cost of early intervention is almost always lower than the cost of a failed delivery.

Importantly, AI is not replacing human judgment. The most effective implementations use AI to:

- Prioritise attention, provide context and support faster, more informed decisions.
- Ensure Operations teams remain central and that their time is focused where it has the greatest impact.

What Comes Next for the Industry

The foundations required for AI in freight already exist across much of the industry:

The next phase of maturity lies in transforming this data into predictive intelligence that actively shapes decisions, rather than passively reporting outcomes.

Currently, 6.5% of freight movements are actively managed by AI. By the end of 2026, we expect that to increase and the freight organisations that lead the market will be those that anticipate disruption, intervene earlier, optimise carrier and service selection dynamically and use AI to deliver more reliable, resilient supply chains.

AI is no longer an experimental layer in B2B freight. It is becoming a core capability moving the industry from visibility to foresight and from reaction to control.

Insights by

SPARROW XPL

Scope 3 is No Longer Theoretical: Why B2B Supply Chains Face a Major Compliance Wake-Up this Year

For many Australian and New Zealand businesses, sustainability reporting has long felt like a future problem, something to prepare for, but not something that materially impacts day-to-day operations. That assumption no longer holds.

As organisations enter the second year of mandatory climate reporting, Scope 3 emissions are rapidly shifting from a “nice-to-have” disclosure to a material compliance risk, particularly for B2B supply chains. Many businesses remain unaware of the extent of their exposure, or the speed at which reporting expectations are tightening.

The reality is stark: for most B2B organisations, Scope 3 represents 70–95% of total emissions and freight, logistics and transport are often among the largest contributors. This year marks the point where that gap between awareness and obligation becomes dangerous.

What Has Changed: From Voluntary Disclosure to Regulatory Reality

The first year of climate reporting allowed many businesses to focus primarily on:

- Governance
- High-level emissions estimates
- Scope 1 and 2 disclosures

Scope 3 was often treated as directional, incomplete, or aspirational. However, year two fundamentally changes the rules of the game.

Regulators, auditors, investors, and major customers now expect:

- Measurable Scope 3 categories
- Defensible methodologies
- Evidence of data improvement
- Clear plans for reduction and risk management

Insights by

MachShip

For most B2B organisations, Scope 3 accounts for **70–95%** of total **emissions** and 2026 marks the shift from awareness to accountability.

In other words, organisations are no longer being asked whether they are working on Scope 3 — they are being asked how credible their data is and how quickly it is improving. For B2B supply chains, this creates immediate pressure.

Freight emissions are a material Scope 3 category

For Australian B2B organisations, freight is often one of the largest Scope 3 contributors, driven by:

- Geographic scale
- Interstate distribution
- Reliance on third-party carriers
- Mixed parcel, pallet and linehaul networks

Freight emissions fall squarely under Scope 3 Category 4 (Upstream Transportation and Distribution) and, in many cases, Category 9 (Downstream Transportation and Distribution). These categories are explicitly expected to be disclosed where material.

Downstream compliance pressure is already active

Even businesses not yet required to report are being pulled into Scope 3 through:

- ASX-listed customers
- Government contracts
- Infrastructure and construction supply chains
- Multinational procurement policies

These organisations are already required to quantify their Scope 3 emissions — and that includes emissions generated by suppliers' freight activities.

As a result, Australian B2B suppliers are seeing:

- Increased ESG questionnaires
- Requests for freight emissions data
- Sustainability clauses tied to renewals and tenders

For many, inability to provide credible data is already becoming a commercial risk.

Insights by

MachShip

> “If we were audited, challenged by a major customer, or scrutinised by regulators in 2026 — would we be confident explaining our Scope 3 and freight emissions story?”

What Leading Australian Organisations Are Doing Now

Organisations preparing effectively for 2026 are already:

- Centralising freight data across carriers and modes.
- Calculating emissions at lane or consignment level, not annual averages.
- Establishing baselines they can defend and improve year-on-year.
- Embedding emissions into procurement and operational decision-making, not just sustainability reporting.
- Involving operations, finance, sustainability and risk teams together, rather than treating Scope 3 as a siloed initiative.

Importantly, many are discovering that better emissions visibility exposes operational inefficiency and cost savings, creating a business case beyond compliance.

Strategic Insight: What the Data Signals About the Freight Market (2025 → 2026 Outlook)

The Freightability dataset presents a clear story: the ANZ freight market is becoming more fragmented, more volatile and increasingly differentiated by performance.

While national averages have improved, underlying variance is growing — top carriers are consistently delivering DIFOT in the high 90% range, while the long tail of operators continues to underperform, anchoring national service levels at 78%.

At the same time, the economics of delivery are shifting. The report shows downward pressure in parcel pricing across the major capital-city corridors (2–4% reductions), while full truckload (FTL) pricing has increased 12.48% and pallet markets remain mixed, with Brisbane consistently showing upward pressure across both price and demand.

The strategic implication is clear - freight is no longer a commoditised operational function. It is becoming a strategic capability, where competitive advantage goes to businesses that actively engineer service reliability, balance cost-to-serve and use data to optimise decisions lane-by-lane and carrier-by-carrier.

2026 Industry Outlook: Three Big Themes

1.

Reliability becomes the new price

In 2026, the market will increasingly reward predictable performance over cheap rates. Shippers will optimise toward service certainty — and carriers will differentiate through reliability tiers.

2.

Freight decisions will become data-first

As volatility increases, the most competitive shippers will treat freight as a strategic function, using:

- Benchmarking
- Lane-level optimisation
- Proactive exception handling
- Continuously evolving carrier allocation rules

3.

Fragmentation accelerates - ecosystems consolidate

Carrier fragmentation will remain, but technology platforms and ecosystems will consolidate decision-making. Shippers will increasingly adopt orchestration platforms to manage complexity and ensure consistent experience across carrier networks.

Strategic Perspective

The Freightability data reinforces a fundamental shift in the ANZ freight market: service performance, delivery speed and freight cost are no longer stable, uniform, or predictable on averages. They vary by lane, by service type and by carrier capability.

In 2026, the competitive advantage will increasingly belong to shippers who treat freight as a strategic capability — actively managing multi-carrier strategies, optimising warehouse behaviours and using granular data to anticipate and respond to market dynamics.

Freight is moving beyond an operational cost line; it is becoming a core driver of customer experience, margin protection and competitive differentiation.

About Our Partners

Commerce

Commerce (Nasdaq: CMRC) empowers businesses to innovate, grow, and thrive by providing an open, AI-driven commerce ecosystem. As the parent company of BigCommerce, Feedonomics and Makeswift, Commerce connects the tools and systems that power growth, enabling businesses to unlock the full potential of their data, deliver seamless and personalised experiences across every channel and adapt swiftly to an ever-changing market. Trusted by leading businesses like Harvey Nichols, Mizuno, Perry Ellis and Uplift Desk, Commerce delivers the storefront control, optimised data and AI-ready tools businesses need to grow, serve diverse buyers and operate with confidence in an increasingly intelligent, multi-surface world.

Navia

Navia is a global freight forwarding and third-party logistics partner, delivering end-to-end supply chain solutions across ocean, air, warehousing and 3PL. We combine decades of freight expertise with proprietary technology to bring clarity, control and confidence to complex supply chains. Built on two core pillars: expertise in freight and our technology as an advantage. Navia pairs experienced specialists with a powerful platform offering real-time reporting and SKU-level exception management. The result: smarter decisions, stronger performance and supply chains designed to withstand disruption in an increasingly volatile global trade environment. We are expert-driven, tech-backed and chaos-proof.

Hubbed

To transform the sustainability of last mile delivery. HUBBED provides smart delivery solutions that benefit consumers, retailers and logistics companies. Through our ParcelPoint Network, we offer Click & Collect, Returns, Domestic and International Shipping, creating a seamless, cost-effective and sustainable last-mile experience.

Sustainability is at the heart of our business. By consolidating parcel deliveries, we help reduce congestion and emissions, creating a smarter, more sustainable last-mile delivery network.

About Our Partners

TGE

Team Global Express is a leading national transport partner with a multi-modal network across Australia and New Zealand comprising 7,300+ vehicles, 650 depots, 32 cargo aircraft, 25 rail hubs, 8,500 people and 5,000+ delivery partners. Supported by National Control Centres providing 24/7 visibility and centralised peak planning coordinating capacity across modes. Every day, our teams deliver everything from groceries, earth moving machinery, to life-saving medical supplies across road, air and rail.

Find out more about the Resiliency Imperative.

Sparrow XPL

Sparrow XPL is an Australian freight management and technology company operating at the intersection of logistics, data and AI. Sparrow works directly with shippers and carriers to design, operate and analyse real-world freight networks. By combining hands-on freight management with live operational data, digital-twin simulations and applied AI models, Sparrow delivers deep visibility into pricing dynamics, carrier performance and service risk, providing an evidence-based view of how freight networks actually perform, not just how they're contracted.

Who is MachShip

MachShip is Australia's leading B2B freight management platform, trusted by thousands of businesses to move goods efficiently across the country. Powering shipping for over 10,000 customers and processing more than 100 million consignments, MachShip operates at a scale unmatched in the Australian freight technology market.

Through the industry's largest connected carrier network, MachShip manages a diverse mix of parcel, pallet and full truckload freight across metropolitan, regional and remote lanes. This breadth of volume, mode and geography provides MachShip with a unique, real-time view of how freight actually moves across Australia.

Unlike single-carrier or niche platforms, MachShip sits at the centre of the B2B shipping ecosystem — aggregating performance, pricing and service data across 500+ carriers and millions of shipments. This position enables MachShip to identify patterns, trends and shifts that are invisible at a smaller scale.

The insights presented in this report are drawn directly from anonymised, aggregated shipping data flowing through the MachShip platform. They reflect real-world operational behaviour across industries, regions and service types — making MachShip uniquely placed to provide an accurate, data-led view of the state of B2B freight in Australia.