

LOGISTICS INDUSTRY BENCHMARK REPORT · 2026

The CartonCloud Logistics Index

Logistics in transition: navigating growth,
cost pressures and the tech curve

The tenth wave of the Index, based on responses from 393 warehouse
and transport operators across North America, Australia and New Zealand.

Foreword

The CartonCloud Logistics Index report, now in its tenth wave, provides a regular pulse check on sentiment, challenges and priorities for the logistics industry.

This year sees operators in a state of flux and facing a double-edged sword: operating costs are climbing but new technology offers major opportunities to scale.

Given the pace of change, the scope of this report has increased this year. In partnership with research consultants Insights Exchange, we go deeper with a broader group of operators.

The following report is designed to support logistics firms navigating change: managing budget pressures whilst smartly investing in technology to drive sustainable growth.

If you are interested to understand how your business compares, visit our interactive dashboard at benchmark.cartoncloud.com.

Questions? Please contact your CartonCloud team for any queries specific to your sector, region or business operation.

Shaun Hagen

Chief Executive Officer, CartonCloud
benchmark.cartoncloud.com

THIS WAVE AT A GLANCE

393

operators surveyed

165

Index score this wave, of a possible 200

89%

report higher operating costs

10th

wave of the Index

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Executive summary

The CartonCloud Logistics Index is a measure of confidence for the industry. This year the Index sits at 165, where 0 is the lowest (least confident) and 200 is the highest (most confident) level. This suggests that logistics operators hold an optimistic outlook. This sentiment, however, is not evenly spread.

01 The pressure is real, but the response is mixed

Almost nine in ten operators report higher operating costs over the past twelve months, compounded by recent fuel supply volatility and skilled workforce shortages. What separates them is whether they have a set approach to reviewing the pass on rate to customers, or not.

02 A proactive rate approach tracks with a better business outlook

Operators who take an active and transparent approach to reviewing rates, structured or ad hoc, predict a more positive business outlook for the next six months compared to those with no set approach. Noting that the data points to an association here, not a cause.

03 The capacity to confidence gap

The average reported utilisation is 77%, meaning there are pockets of capacity on shelves, trucks and workforces. Smaller operators report the most headroom, larger ones the least. Sentiment tracks in the opposite way: smaller operators are the least optimistic, larger ones the most. Greater capacity does not appear to equate to greater business opportunity.

04 Customer needs are evolving; technology is the key to unlocking demand

Aside from cost, customers are pushing for real-time tracking visibility, akin to food delivery systems, as well as faster turnaround times, better system integrations, data sharing and proactivity. Operators say technology will be key to capturing future demand, paired with practical investments in premises, vehicles and staff.

05 AI use cases are broad; adoption is a gradual process

Many operators now use AI for everyday tasks and roughly one in five have embedded AI into their workflows and operations. Use cases are wide ranging: AI is supporting analytics, customer service, forecasting, admin, sales, and marketing. Operators who are embracing AI tend to be more optimistic about future business performance.

Methodology and sample

This report is based on responses from 393 warehouse and transport operators across North America, Australia, and New Zealand, surveyed online during July and August 2026. Participation was voluntary and the responses presented here are self-reported.

The methodological approach has changed this year, including changes to recruitment, sample distribution, and survey questions. This includes the Index calculation, set out on page 06. All prior waves have been recalculated on the new method for the trend in Figure 3.

Figure 1. Sample composition

Label	%	n	Label	%	n
REGION			BUSINESS SIZE (EMPLOYEES)		
AU / NZ	53%	207	49 or less	31%	122
North America US / CA	47%	186	50 to 99	21%	83
BUSINESS TYPE			100 to 249	30%	118
1PL Handle their own first party logistics	34%	133	250 to 999	18%	70
3PL Handle third party logistics for other companies	66%	260			

Base: all respondents (n=393). Percentages may not total 100 due to rounding.

REPORTING THRESHOLDS

n < 30

Not reported. The base is too small to read.

n 30 to 50

Reported as indicative only and flagged on the figure.

n ≥ 50

Reported with significance testing at the 95% level.

About this data

Findings reflect the experience of the surveyed operators, at a particular point in time, and do not necessarily represent the entire industry. Use this report as a starting point for a conversation about your own operation, not a formal audit.

Some questions, such as rating questions, required a single response and hence the percentages shown will total 100%. Other questions, such as challenges, allowed for multiple responses and percentages therefore do not total 100%.

Where there is an offer of what a finding may mean, this should be treated as an interpretation and point of view, based on experience and prevailing market factors.

In the most part, this report presents the general or consolidated view of operators. Where there are differences between groups, for example operation type or region, these are noted. Differences have been tested for statistical significance at the 95% level. In plain terms, this means that when we call out a difference as significant, the delta can be read as a real trend. Differences that are not marked as significant are worth noting but should be treated as directional only.

ABOUT THE CARTONCLOUD LOGISTICS INDEX

The Index is a single-number score representing the sentiment of logistics operators. It comprises three sentiment questions: Economic Outlook, Growth Potential, and Hiring Intent. The Index ranges from 0 to 200, where 100 is considered average or neutral; a higher score indicates more positive sentiment and a lower score indicates a negative position.

Given our expanded methodology this year, and in order to provide additional insight to the industry, the Index calculation has also been updated. This 2026 report has adjusted all prior waves of the Index to align with the updated methodology, to provide a comparative view.

COMPONENT 1

Economic outlook

COMPONENT 2

Growth potential

COMPONENT 3

Hiring likelihood

Significance markers

A marker shows where a subgroup result sits significantly above or below the comparison group at the 95% level.

▲ above total ▼ below total

Currency and regional wording

Rate and cost figures are reported in the currency and billing cycle respondents were asked in, filtered by region rather than converted.

Key findings at a glance

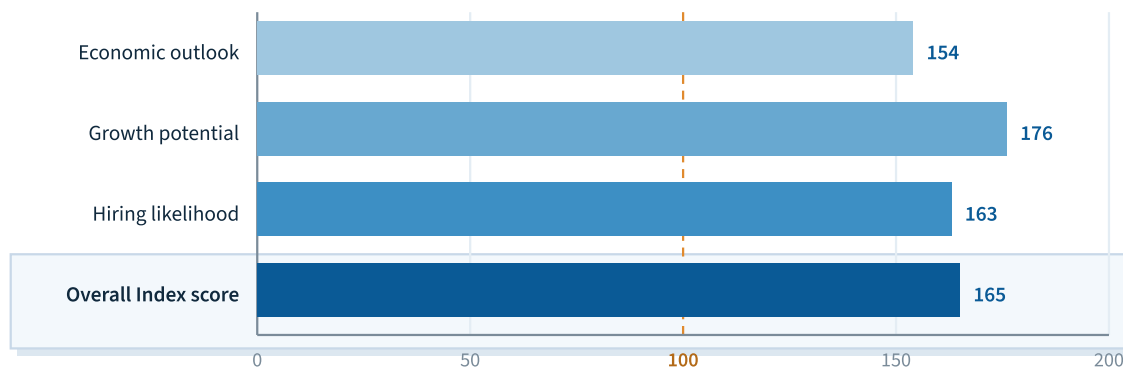
Key stats related to this year’s report. Each is explored in the chapter noted beside it.



01 The CartonCloud Logistics Index

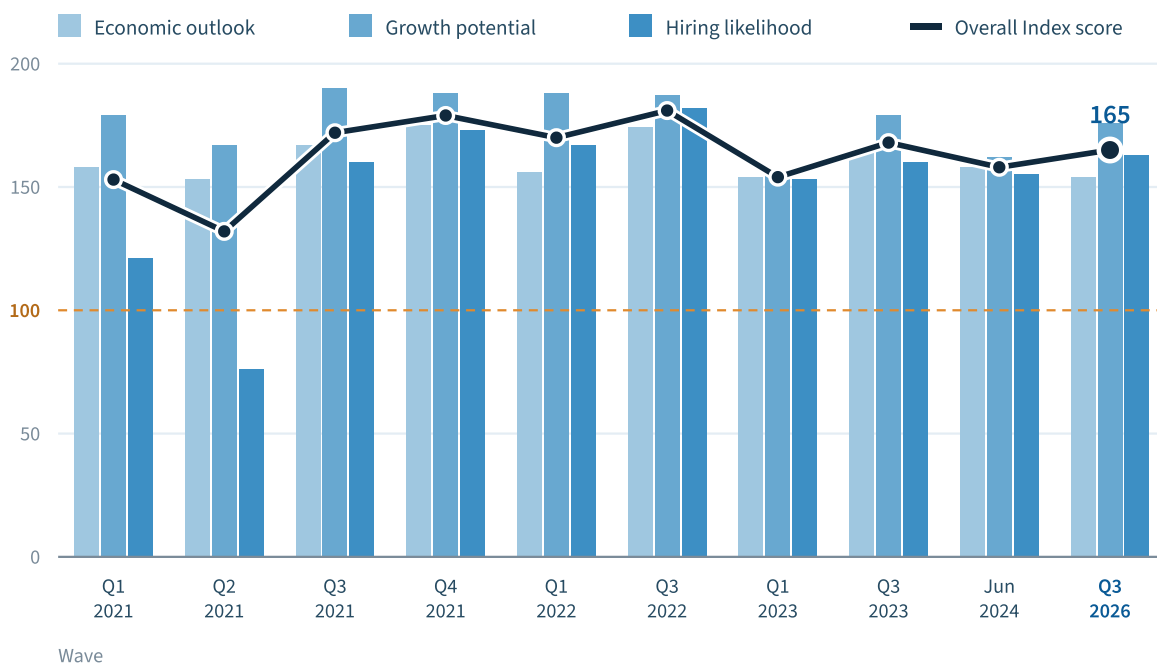
The CartonCloud Logistics Index sits at 165 this year, where 0 is the lowest and 200 is the highest level. This suggests that logistics operators hold an optimistic outlook, particularly in how they expect their business to perform over the next six months. This year's Index is broadly in line with previous waves, below the high point of 2022, but above the low point of 2021. Expected Growth Potential consistently tracks above the current Economic Outlook.

Figure 2. The Index and its components, 2026



Base: all respondents (n=393). Q1, Q2, Q3. The Index runs from 0 to 200, where 100 is neutral.

Figure 3. The Index over time, 2021 to 2026



Base: all respondents this wave (n=393). Q1, Q2, Q3. Scores for previous waves have been recalculated on the new Index method, so they differ from the figures published in earlier reports. Earlier waves were run in house by CartonCloud; the 2026 wave was conducted by Insights Exchange.

Confidence by Business Size and Operation

Sentiment, however, is not evenly spread. 3PL operators are more positive than 1PL, and larger operators are much more positive than smaller firms.

Figure 4. The Index by operator type

Index component	1PL n=133	3PL n=260
Economic outlook	150	157
Growth potential	172	178
Hiring likelihood	153	168
Overall Index score	158	168

Base: as shown. Q1, Q2, Q3.

Figure 5. The Index by business size

Index component	49 or less n=122	50 to 99 n=83	100 to 249 n=118	250 to 999 n=70
Economic outlook	128	158	164	181
Growth potential	165	172	182	190
Hiring likelihood	134	165	177	189
Overall Index score	142	165	174	187

Base: as shown. S2, Q1, Q2, Q3.

WHAT THIS MEANS

At an overall level, sentiment is positive. In the most part, operators recognise the unpredictable environment of the past year, but they are hopeful for the future; Growth Potential tends to track higher than retrospective performance or Economic Outlook. Taking a topline view, however, masks the underlying nuances; smaller operators are at risk of losing ground. This indicates that context matters more than the headline score, and tailored strategies may be required, explored more in the following chapters.

02 Costs and rates

Operational costs have risen for almost all operators. Charge out rates to customers have also increased this year.

Figure 6. Costs, rates and average storage fees



Base: all respondents (n=393) for costs and rates; AU / NZ warehousing businesses (n=166) and US warehousing businesses (n=151) for storage rates. Q4, Q5, Q8. Storage averages are rounded and reported in local currency on different billing cycles.

Storage fees

Storage fees are variable, ranging from a few dollars in local currencies to more than \$40, depending on the operator and region. The average storage rate, for warehousing operators, is just over \$20 per week in AU / NZ and almost \$30 per month in North America. The benchmark for smaller operators is towards the under \$10 per week in AU / NZ (39% pallet storage \$1 to \$10 per week, and 27% \$1 to \$10 per week for pick bins). Each region is set out separately overleaf.

Figure 7. Storage fees by region

AU / NZ WAREHOUSING BUSINESSES n=166, of which under 49 employees n=56

Fee band, per week	Pallet storage		Pick bin storage	
	All	Under 49 employees	All	Under 49 employees
\$1 to \$10	17%	39% ▲	15%	27% ▲
\$11 to \$20	19%	13%	19%	29%
\$21 to \$30	24%	16%	24%	7% ▼
\$31 to \$40	20%	5% ▼	17%	7%
More than \$40	11%	9%	12%	5%
Not offered	9%	18%	12%	26% ▼

US WAREHOUSING BUSINESSES n=151

Fee band, per month	Pallet storage	Pick bin storage
\$1 to \$10	1%	3%
\$11 to \$20	13%	13%
\$21 to \$30	32%	29%
\$31 to \$40	23%	23%
More than \$40	25%	24%
Not offered	6%	9%

Base: AU / NZ warehousing businesses (n=166), of which under 49 employees (n=56); US warehousing businesses (n=151). Q8, reported in local currency. AU / NZ fees are weekly and US fees are monthly, so the two are not directly comparable and have not been converted. ▲ and ▼ mark a result significantly above or below all AU / NZ warehousing businesses at the 95% level. There were no statistically significant differences by employee size among US warehousing businesses, so US results are not reported by business size.

REGIONAL CALLOUT

Storage rates are not comparable across regions

Respondents reported storage rates in their own currency and their own billing cycle: weekly in AU / NZ and monthly in North America. Rather than converting, each region is reported on its own terms.

Business challenges

Rising costs are compounded by additional factors such as the recent fuel crisis, a lack of skilled workers and variable trade policies. Customer expectations are also evolving, and the competition is intensifying; the pressure is on to keep fees low. Looking forward, operators expect these trends to continue, at least for the short term.

While these are common challenges across regions, notable nuances are also evident. Operators in AU / NZ say increased costs is by far the top challenge they have faced this year, and they expect this to be the top issue over the coming twelve months. North American operators place fuel and freight rate volatility above increased costs. Technology change is also being felt more intensely in North America.

Figure 8. Top business challenges experienced over the last 12 months versus expected over the next 12 months, by region

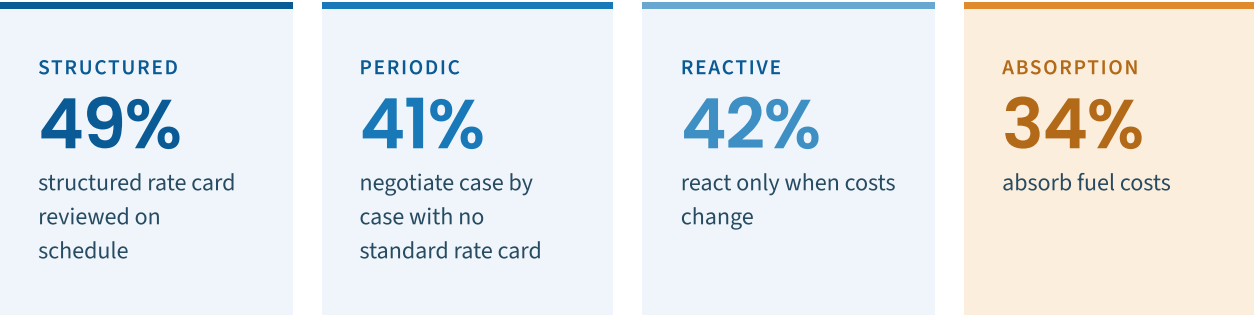
Rank	AU / NZ (n=207)		North America (n=186)	
	Experienced past 12 months	Expected next 12 months	Experienced past 12 months	Expected next 12 months
1	Increasing costs 45% ▲	Increasing costs 39% ▲	Fuel and freight rate volatility 43%	Fuel and freight rate volatility 35%
2	Fuel and freight rate volatility 45%	Fuel and freight rate volatility 37%	Increasing costs 28%	Pressure from customers to reduce costs 25%
3	Pressure from customers to reduce costs 22%	Customer demand softening 21% ▲	Tariffs and trade policy 23%	Increasing costs 25%
4	Skilled workforce shortages 17%	Customer expectations increasing 20%	Customer expectations increasing 23%	Skilled workforce shortages 21%
5	Tariffs and trade policy 16%	Pressure from customers to reduce costs 18%	Pressure from customers to reduce costs 22%	Competition from large multinational companies 20%
6	Interest rates and access to capital 15%	Tariffs and trade policy 15%	Skilled workforce shortages 20%	Tariffs and trade policy 19%
7	Competition from large multinational companies 14%	Competition from large multinational companies 15%	Competition from large multinational companies 19%	Customer expectations increasing 17%
8	Customer demand softening 14%	Supply chain disruption 15%	Infrastructure changes 18%	Infrastructure changes 17%
9	Customer expectations increasing 13%	Competition from local operators 15%	Customer demand softening 17%	Technology change 17% ▲

Base: AU / NZ (n=207); North America (n=186). Q10. Multiple response, ranked within each column. ▲ significantly higher than the other region at the 95% level.

Managing rate reviews

The management of charge out rates ranges from structured reviews and periodic negotiations to reactive measures and temporary surcharges. 59% of operators use a mix of standard and custom rates; there is no one size fits all approach across operators or circumstances.

Figure 9. Rate review strategies



Base: all respondents (n=393). Q6, Q7. Multiple response, so categories are not mutually exclusive and do not total 100.

“Negotiating with our freight providers for lower or a set fee charge. It’s been very complicated over the last 12 months because of fuel charges and having to renegotiate with our customers, or raise rates. A lot of our customers cannot handle that blow.

NORTH AMERICA · 3PL

Figure 10. Rate review strategies by business size

Smaller operators, 49 employees or less, are less likely to be taking a structured or periodic approach.

Q7. Approach to reviewing rates	Total	49 or less	50 to 99	100 to 249	250 to 999
Base	393	122	83	118	70
Structured rate card, reviewed on schedule	49%	38% ▼	51%	53%	61%
Periodic, negotiated case by case	41%	29% ▼	41%	53%	40%

Base: as shown. S2, Q7. Multiple response, so categories are not mutually exclusive. ▼ significantly below the total at the 95% level.

Rate Reviews by Region

North American operators tend to take a more active approach to managing rates than their AU / NZ counterparts, across structured, periodic, and reactive strategies alike.

Figure 11. Rate review strategies by region

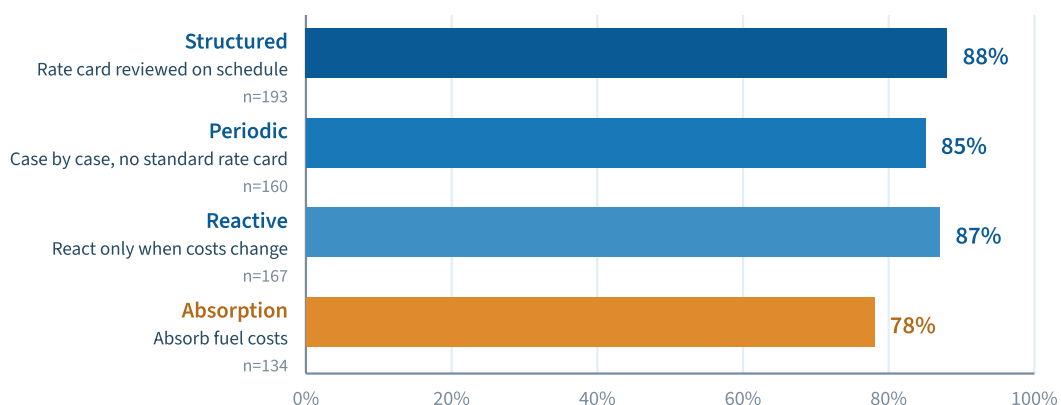
Q7. Approach to reviewing rates	AU / NZ n=207	North America n=186
Structured rate card, reviewed on schedule	40%	59% ▲
Periodic, negotiated case by case	31%	51% ▲
Reactive, only when costs change	31%	53% ▲

Base: as shown. Q7. Multiple response, so categories are not mutually exclusive. ▲ significantly above the other region at the 95% level.

Action is better than no action

Critically, when operators take an active approach to reviewing rates, sentiment around future growth potential is higher than those that take no action. Noting that the data points to an association here, not a cause.

Figure 12. Rate review strategies and growth potential



Base: as shown. Q2, Q6, Q7. Share expecting their business to perform well or very well over the next six months. Groups are not mutually exclusive, so an operator can appear in more than one.

WHAT THIS MEANS

With cost increases almost reaching saturation point, operators are left with no choice but to pass something on to customers. But increased competition means there is market pushback to maintain reasonable rates. Operators are walking a tightrope between managing rising costs and continuing to offer value and quality service to customers. Taking a proactive approach means operators can be more prepared. In addition, being fair and transparent with customers is a prerequisite for building trust. Together, these factors help solidify the future outlook.

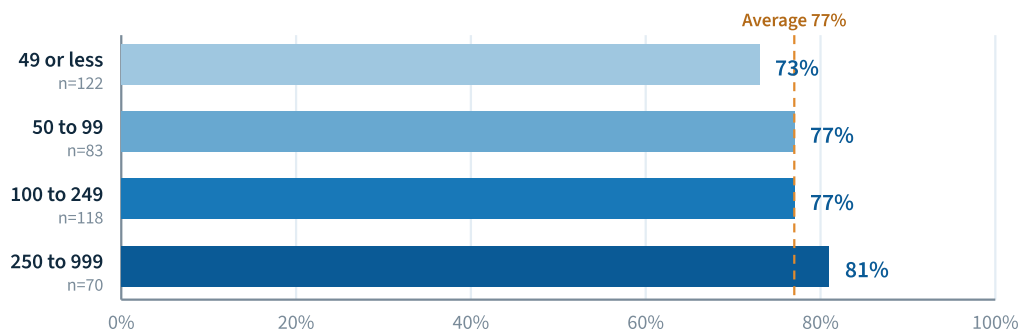
03 The capacity to confidence gap

Not all operators are the same; size tracks capacity and confidence.

Capacity

The average reported utilisation is 77%, meaning the average operator has 23% capacity to take on additional work. Capacity may mean on shelf, on truck, or across the workforce. Smaller operators report the most headroom, larger ones the least.

Figure 13. Capacity by business size

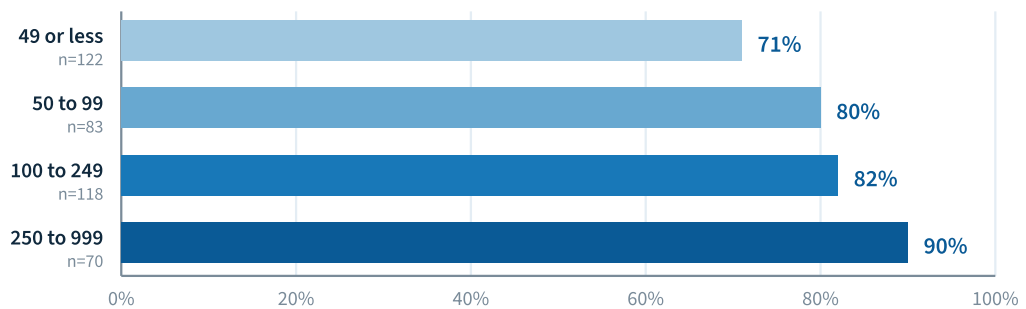


Base: as shown. S2, Q9. Average reported capacity in use.

Confidence

Like capacity, business confidence also scales with size. Larger operators expect better business performance over the coming six months than smaller operations do.

Figure 14. Expected business performance by business size



Base: as shown. S2, Q2. Share expecting their business to perform well or very well over the next six months.

WHAT THIS MEANS

While capacity exists, it does not necessarily correlate with future growth potential. Smaller operators may maintain a just in case flexibility in their operations, but this means they are less well shielded from market volatility. Larger operators, potentially with a more granular view of utilisation and, as seen above, a more structured approach to monitoring business activities and reviewing rates, are generally more confident. While there is likely a difference in how capacity is tracked as much as how it is filled, larger operators appear to be more disciplined and this is translating to better expectations for their business.

04 Evolving customer needs

While one in five operators (19%) are holding ground rather than actively looking to grow their business size or scale, others are employing multiple strategies to support their business ambitions. This ranges from doing more with current customers, building new lines of service, or making structural efforts to improve efficiencies or build partnerships.

North American operators are looking to improve efficiencies at a much faster rate than their AU / NZ counterparts: 46% versus 29%.

Figure 15. Growth strategies

EXISTING CUSTOMERS	NEW ACTIVITIES	STRATEGIC CHANGE
Growing volume with existing41%	Winning new customers42%	Improving efficiency rather than growth37%
Cross selling to existing customers22%	Expanding to new geographic markets30%	Acquisition or partnerships20%
	New segments or verticals29%	
	Selling new service lines22%	

Base: all respondents (n=393), AU/NZ n=207; US/CA n=186. Q11. Multiple response.

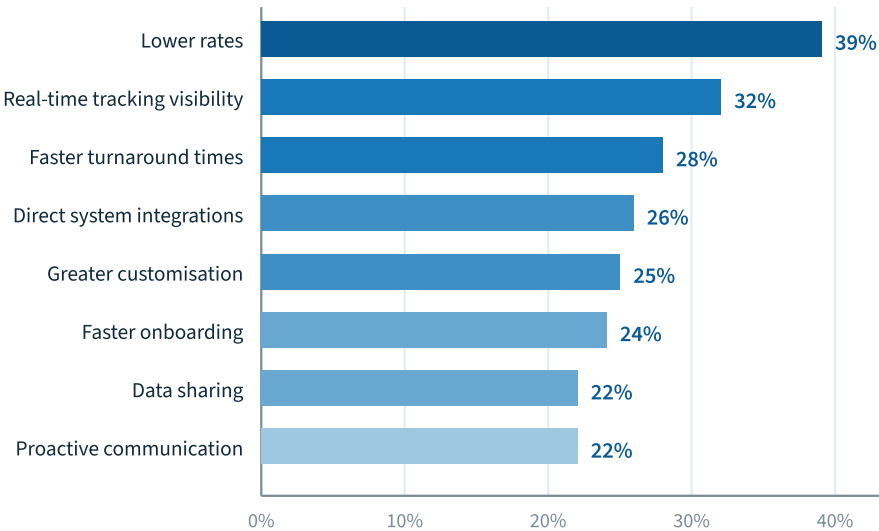
“ Finding the most cost effective ways of doing business so our staff time is freed up. Making sure we are being as efficient as possible and using technology to assist.

AU / NZ · 3PL

Evolving customer demands

Customer needs are evolving, and this may mean a strategic realignment is required. Maintaining low rates is the number one ask. But customers are also pushing for more timely service, greater tracking visibility, better system integration, and customised offers.

Figure 16. Customer demands



Base: all respondents (n=393). Q18. Multiple response.

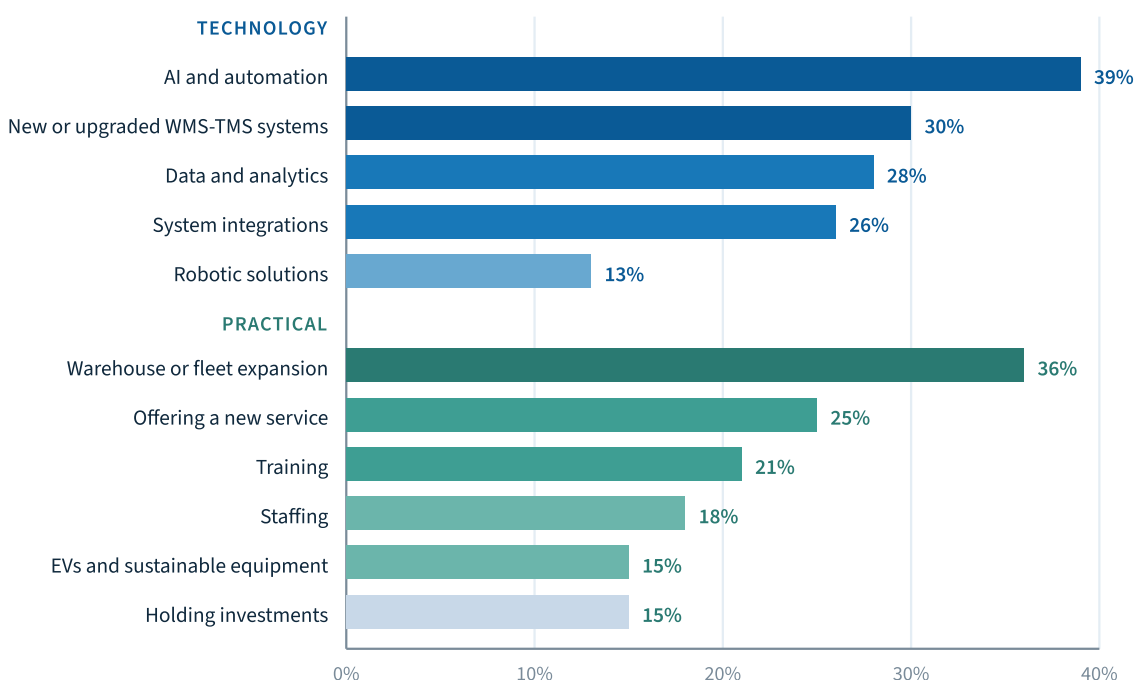
“ ... prioritize getting live visibility on every shipment so we aren’t stuck on the phone all day. That way customers get updates automatically and we can spend time fixing problems instead of just tracking trucks.

NORTH AMERICA · 1PL

Capturing future demand

Technology, especially AI and automation, is seen as a vital way for operators to capture future demand. Practical strategies, like investing in premises, vehicles, and staff, are also equally important to capitalising on market opportunities.

Figure 17. Capturing future demand



Base: all respondents (n=393). Q12. Multiple response. Grouping into technology and practical is an analytical grouping, not a survey structure.

REGIONAL CALLOUT

North America is investing ahead of AU / NZ on systems, analytics, and sustainable equipment

37% ▲

New or upgraded WMS-TMS systems

38% ▲

Data and analytics

20% ▲

EVs and sustainable equipment

US / CA operators (n=186) are significantly higher than AU / NZ operators (n=207) on each of these at the 95% level. Q12.

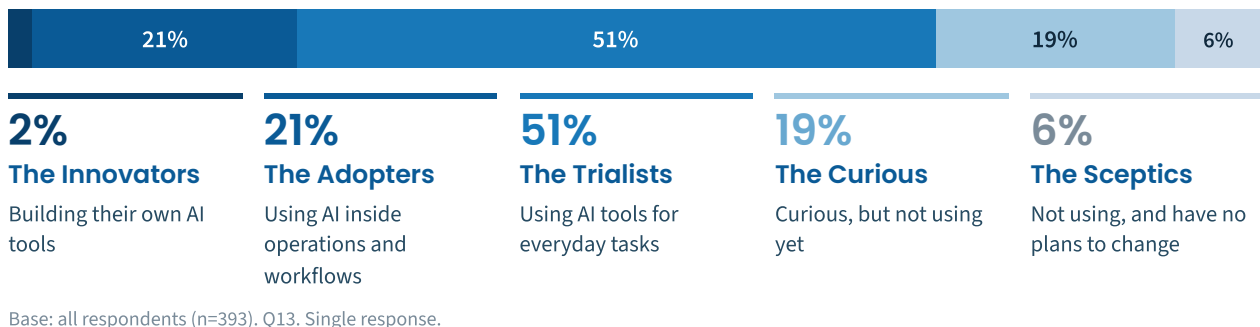
WHAT THIS MEANS

Competitive pricing may win customers in the short term, but value supports longer-term business success. Adjacent categories, like real-time food delivery tracking, have reset the expectations for logistics. Value in this context, as defined by evolving customer demands, equates to real-time visibility, speed and responsiveness, system integrations, proactivity, and customised rather than one size fits all approaches. Investing in technologies that support evolving customer needs is critical for demonstrating a clear return on investment to customers.

05 AI adoption

It is now common practice for operators to be using AI for everyday tasks; 51% of operators claim this. However, usage beyond this ranges from in-house innovation and early adoption to curiosity and some levels of scepticism.

Figure 18. AI usage

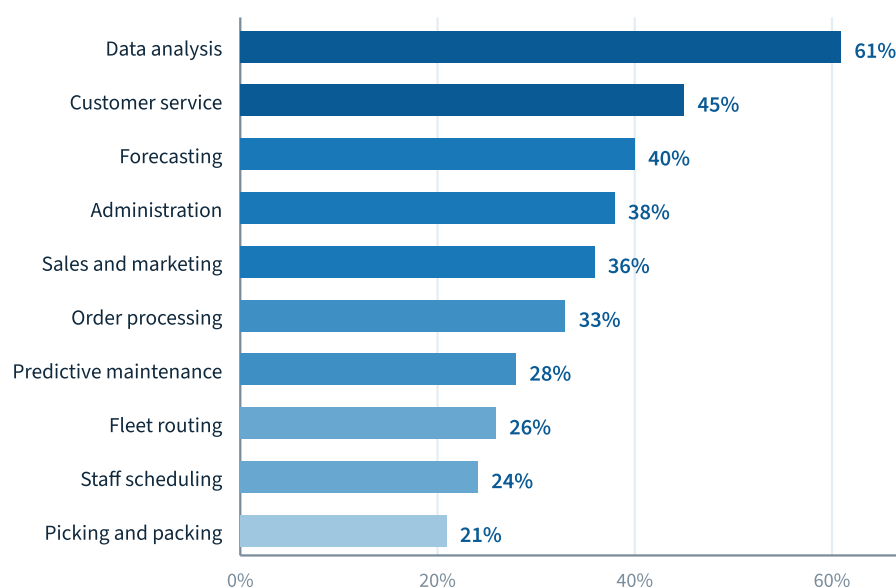


Early Adopters tend to be larger operators, Trialists appear more in North America, the Curious tend to be smaller operators, and AU / NZ operators carry the most scepticism, albeit still below 10%.

AI use cases

AI is being used in a multitude of ways, supporting the business on analytics, customer service, forecasting, admin, sales and marketing, and more. Data analysis is the most common activity.

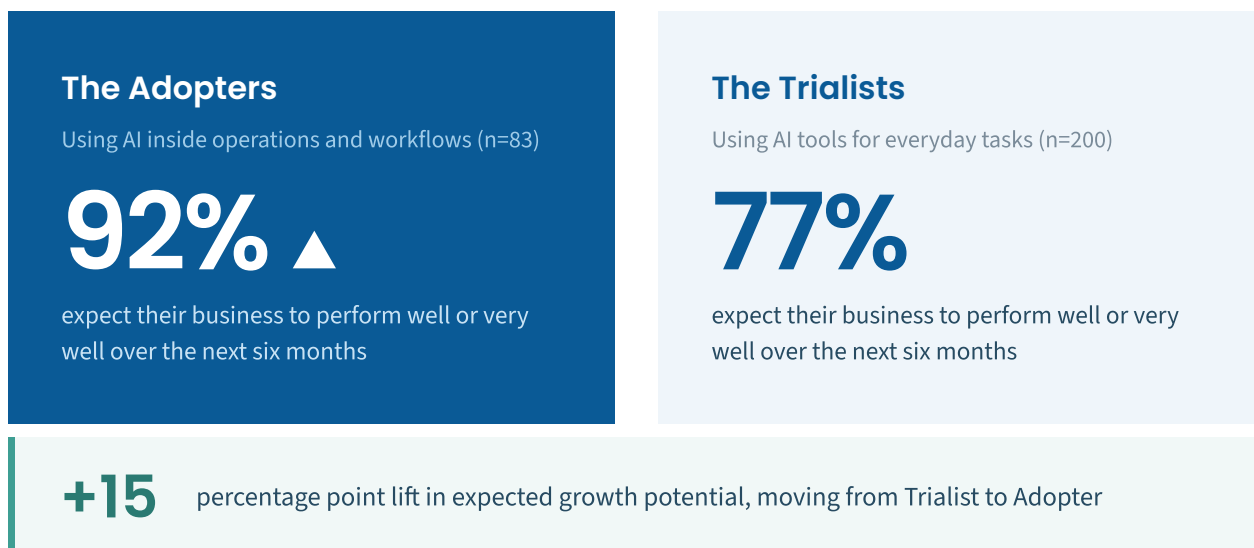
Figure 19. AI use cases



AI usage and expected growth potential

As seen with more active approaches to rate negotiations, higher AI adoption is also connected to improved sentiment around future growth potential. The movement from being a Trialist to an Adopter is an important step: between these two groups, the expected growth potential increases by 15 percentage points. While this does not show a definitive correlation, the step change is significant.

Figure 20. AI usage and expected growth potential



Base: as shown. Q13, Q2. ▲ significantly above the Trialists at the 95% level. The Innovators (n=8) and the Sceptics (n=24) fall below the n=30 reporting threshold and are not reported.

In the context of mixed adoption patterns, operators say they prefer working with software specialists to build systems that can be customised to their specific needs. 32% of operators say they would have their existing software provider build or embed AI for them. (Q16. Base: all respondents n=393.)

“ We really need to get serious about automating our main key operations, because setting up a modern warehouse system will save heaps of manual work, cut costs significantly, and help us run our business much faster and more profitably.

AU / NZ · 1PL

WHAT THIS MEANS

While AI is evolving at pace, active integration into business operations is more gradual. Existing software specialists can help support operators on their technological journeys, particularly in moving smaller, curious operators to trial and adoption. In addition, those that are leaning into technology today can act as advocates for more cautious operators, providing inspiration for potential use cases and positive outcomes associated with using technology. AI must justify the investment. As benefits become clearer and user confidence grows, practical application will follow.

Conclusion

The 2026 CartonCloud Logistics Index reveals an industry managing a complex balance between immediate cost pressures and long-term technological transformation. While the overall sentiment remains cautiously optimistic, with an Index score of 165, success appears increasingly tied to proactivity, especially in how operators engage with customers, for everyday processes and in handling the tough financial conversations.

The data suggests that operators who adopt structured rate review strategies and actively integrate AI into their workflows are reporting higher confidence and stronger future outlooks than those who do not.

Recommendations for the Industry

01 Implement structured rate reviews

Move away from reactive or absorption-based models. A transparent, structured approach to rate setting with customers is associated with a more positive business outlook.

02 Prioritise customer-centric technology

Focus investments on technologies that directly address evolving market demands and deliver efficiencies to your operations, such as real-time tracking and improved system integrations.

03 Bridge the AI trust gap

Leverage the experiences of early adopters and specialists within your network to demystify AI use cases. Start with high-impact, low-risk areas like data analysis and customer service to demonstrate return on investment before scaling further.

FUTURE OUTLOOK

The logistics landscape is shifting towards a model where technology is no longer optional but a prerequisite for competitiveness. While economic volatility will persist in the short term, the operators that leverage technology and data to meet the sophisticated demands of modern customers will be best positioned to capture future growth. The gap between optimistic, high-performing operators and their more cautious counterparts will likely widen as technological adoption matures from everyday experimentation into embedded operational reality.

Glossary of terms

How to read this data

These results come from an online survey of 393 senior operators and decision-makers in third-party logistics and related businesses across Australia, New Zealand, and North America, run during July and August 2026.

The figures describe the operators who took part, not every logistics business in the market.

Where we compare groups, we only call out a difference when it is large enough to be reliable.

The data shows what is happening now and what operators expect. It is not a forecast or a guarantee.

CORE TERMS

CCLI (CartonCloud Logistics Index)

A single score tracking how confident logistics operators feel about their business conditions.

The CartonCloud Logistics Index, or CCLI, is a single score summarising how logistics operators feel about current and expected business conditions. It combines three sentiment questions: Economic Outlook, Growth Potential, and Hiring Intent. The score runs from 0 to 200, where 100 is average or neutral. The calculation changed in 2026, and all prior waves have been recalculated on the new basis, so the figures differ from those published in earlier reports.

Top two box

The two most positive answers on a scale added together, for example “agree” plus “strongly agree”.

Survey questions often use a five-point scale, from strongly disagree through to strongly agree. Top two box, sometimes shortened to T2B, combines the two most positive answers into one figure. It shows the share of operators who hold a clearly positive view, rather than splitting them across similar answer options. Where we report the two most negative answers combined, we call it bottom two box.

Indicative

Based on a small group, so read it as a direction of travel rather than a firm number.

Results flagged as indicative are based on between 30 and 50 responses. They point to a pattern but are too small to be a precise measure, so use them as a signal rather than a hard figure. Where fewer than 30 operators answered, we do not show a result at all.

Index

A number set against a neutral point of 100, on a scale that runs from 0 to 200.

An index converts several survey answers into one number measured against a fixed reference point, in this case 100 on a scale that runs from 0 to 200. Indexing makes sentiment easy to read at a glance: a score of 165 tells you the balance of opinion sits well above neutral, without you needing to compare each underlying question. The index is a relative measure, so the distance from 100 matters more than the number itself.

Base

The number of operators a figure is based on, and how large that group is next to the full sample.

The base is how many survey respondents a figure is calculated from, so you can see how much of the overall picture it represents. It changes from chart to chart, because not every question was asked of every respondent and because filtering narrows the group. The base is always shown with the result, and it is the first thing to check: the smaller the base, the more cautiously the figure should be read.

Operation type

What the business physically does day to day: transport, warehousing, freight forwarding or cross-docking.

Operation type describes the kind of logistics work a business carries out, rather than the goods it handles. The categories are transport, warehousing, freight forwarding, and cross-docking. Many operators run more than one, so figures by operation type can add to more than 100%. It is separate from whether a business is a 1PL or a 3PL.

READING THE NUMBERS

Respondents and operators

The people who completed the survey. We use both words for the same group.

Respondents and operators refer to the same people: the 393 senior operators and decision-makers who completed this survey. We say respondent when we are talking about the survey itself, and operator when we are talking about the businesses they run. Everyone included was screened to make sure they hold responsibility for how their operation is run.

Statistical significance

A difference big enough that it is very unlikely to be down to chance.

When two groups give different answers, some of that gap is normal survey variation. A difference is called statistically significant when it is large enough that we can be confident it reflects a real difference between the groups, not chance. We test at the 95% confidence level, which means that if the same survey were repeated 100 times, we would expect a result like this in about 95 of them. Differences that do not reach that bar are still shown, but they are not called out as findings.

Confidence level

How sure we are that a result reflects a real difference. We use 95%.

The confidence level is the standard the data has to clear before we treat a difference as real. At 95% confidence, roughly 95 out of every 100 repeats of the survey would produce a similar result. It is the conventional benchmark in market research and the one used throughout this report.

Sample

The group of operators who took part in the survey.

The sample is everyone who completed the survey: 393 senior operators and decision-makers across Australia, New Zealand, and North America, surveyed online during July and August 2026. Only completed responses are included in the results.

Statistically reliable

Our plain-English way of saying a result is solid enough to act on.

Statistically reliable is the everyday phrase we use for a result that clears two bars: enough operators answered for the figure to stand up, and any difference we highlight is large enough that it is very unlikely to be down to chance. Where a result clears only part of that, we flag it as indicative or do not show it at all. Base and statistical significance set out the detail behind the phrase.

Findings

The points we call out as worth acting on, rather than every number reported.

A finding is a result we highlight because it is both statistically reliable and meaningful for the business, rather than simply a number that appears in the data. Every figure is there to explore, but we only call something a finding when it clears the reporting bar and tells operators something that affects how they run or grow their business. Findings describe what operators reported. They are not recommendations, predictions, or evidence that one thing caused another.

COMPARING RESULTS

Wave

One round of the survey. The CCLI ran quarterly from 2021 to 2025, and annually from 2026.

A wave is a single round of the survey. The CCLI has been run since 2021, and this is the tenth wave. Up to and including 2025 it ran quarterly, and from 2026 it moves to an annual cycle. This wave also changed recruitment, sample distribution, survey questions, and the Index calculation. All prior waves have been recalculated on the new basis, so the trend can still be read. Where a question was introduced or changed between waves, we note it.

IPL and 3PL

1PL businesses move their own goods. 3PL businesses handle logistics for other companies.

A first-party logistics business, or 1PL, handles the movement and storage of its own goods. A third-party logistics business, or 3PL, provides those services to other companies as its core offer. The two operate under different commercial pressures, so results are often shown separately.

Filtering

Narrowing the results to a group like your own, for example by region, operation type or business size.

Filtering narrows the results from the full sample to a particular group of operators, for example by region, operation type, or business size. In the companion dashboard, every chart updates to show only the operators who match what you have chosen. The more filters you apply, the smaller that group becomes, so check the base each time.

Percentage point

The simple gap between two percentages. Going from 40 to 45% is a rise of five percentage points.

A percentage point is the gap you get by subtracting one percentage from another. If a figure moves from 40% to 45%, that is a rise of five percentage points. People often describe that as a rise of 5%, but the two mean different things: a rise of 5% would take 40% up to only 42%. To keep the difference clear, we use percentage points whenever we describe the gap between two figures.

Benchmark

The comparison figure for operators like you, so you can see where you sit.

A benchmark is the reference point your own operation can be measured against. Filtering the companion dashboard to a profile like your own shows what comparable operators reported, so you can see whether you sit above, below, or in line with them. A benchmark is not a target or a recommendation.

A NOTE ON TOTALS

Figures may not add to exactly 100% because of rounding, or because a question allowed more than one answer. Where a result is indicative, the flag is shown next to the figure itself as well as here in the glossary.



The CartonCloud Logistics Index 2026

A regular pulse check on sentiment, challenges and priorities for the logistics industry, now in its tenth wave.

To understand how your business compares, visit our interactive dashboard

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