EXECUTIVE SUMMARY

INDUSTRY WHITEPAPER · 2026

The Moving Industry *the Way I See*

Five forces reshaping international mobility, and why the industry's next decade will look nothing like its last.

Drawing on publicly available data, industry association research, and observations from operating across **35+ countries**, this paper examines the structural shifts already underway and lays out what the top-quartile movers, DSPs and RMCs will look like by 2030.

THE FIVE FORCES

01 **The End of the Black Box**

Real-time visibility across 5-15 stakeholders is now the contract minimum, not a differentiator.

02 **Trust is the New Differentiator**

FAIM 3.4, CMMC, ISO 27001, ESG. The audit trail is the sales tool.

03 **AI-Native vs. AI-Bolted-On**

Purpose-built agents on private data. Architecture first, features second.

04 **Serving Those Who Serve**

Military and government mobility: highest standards, highest stakes.

05 **Transaction to Relationship**

Recurring mobility beats per-move bidding. Persistent data creates loyalty.

Carlos Ferri

Founder and CEO, Moveezi · Sydney, Australia

CONTEXT

Why this paper, and why now

Three events in eighteen months broke the industry's old playbook: consolidation at the top (SIRVA/BGRS, Mobilitas/Santa Fe, Gosselin/Delcatrans), the collapse of the USD 17.9B US military GHC contract in June 2025, and the first AI-native workflows going live in production. These are not independent forces; they are converging into a single architecture question that every mover, DSP, platform and RMC will answer in the next 18 months, whether they choose to or not.

$30B	**58%**	**51%**	**7,400**
International moving market by 2032	On-time rate that triggered the GHC termination	Mobility managers citing rising costs as top challenge	Shipments terminated by TRANSCOM for failure

THE ARGUMENT, IN THREE LINES

On visibility

For decades, the industry rewarded opacity. The origin agent knew what was packed. The freight forwarder knew where the container was. The RMC held the account. None shared it in real time. That model is now a liability.

On AI architecture

The distinction between AI bolted onto legacy systems and AI built into the platform architecture is not academic. For companies handling personal data and military household goods, it is a compliance requirement with real consequences.

On the recurring model

The mover who captures the assignee's lifecycle (survey, transit, delivery, settling-in, repatriation, next assignment) earns recurring value resistant to price competition. The mover who treats each job as a transaction competes on rate until the margin is gone.

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> *The reset is real. The companies that act on architecture: visibility, trust, AI-native design and genuine relationships, will own the next chapter.*
>
> CARLOS FERRI — MOVEEZI

THE FULL PAPER

14 pages. Seven chapters.

The data, the arguments, and a 2030 vision for what good looks like. Available on request.

Contact Carlos · carlos@moveezi.com

Sources: GAO, FIDI Focus, Cartus, KPMG, IBISWorld, and public company announcements. Quotes from industry leaders are attributed from published press materials and public interviews.