

Global Logistics Services (3PL & 4PL) Market Size Study & Forecast, by Deployment Type (On-Premise and Cloud-Based), By Mode of Transport (Airways, Railways, Roadways, and Waterways), By End Use (Automobiles, Machinery, Apparel & Footwear, Pharmaceutical Products, Retail, Aircraft/Ships/Railways, Electronics, Petrochemicals, Agriculture, Building Materials, and Others), and Regional Analysis, 2023-2030

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Abstracts

Global Logistics Services (3PL & 4PL) Market is valued at approximately USD XX billion in 2022 and is anticipated to grow with a healthy growth rate of more than XX% over the forecast period 2023-2030. 3PL refers to the delegation of logistics and supply chain management tasks to a third-party provider. These services encompass transportation, warehousing, distribution, freight forwarding, and other logistical functions. 3PL providers offer a wide range of services, enabling businesses to select specific tasks to outsource based on their requirements. Likewise, 4PL involves a deeper level of outsourcing, where a company entrusts the complete management of its supply chain to a fourth-party provider. This encompasses logistical services and also strategic planning and coordination among multiple 3PL providers. 4PL providers serve as strategic collaborators, incorporating logistics strategies with overarching business goals and adopting a comprehensive view of the supply chain to optimize its entirety. The growth of the global logistics services (3PL & 4PL) market is attributed to the increasing need for cost-effective solutions and rising demand for last-mile delivery solutions coupled with the rising globalization and surge in international trade. Also, technological advancements in logistics have facilitated real-time monitoring of goods and fleets,

further bolstering market growth.

In addition, the growth of the e-commerce sector is expected to fuel the expansion of the 3PL (Third-Party Logistics) and 4PL (Fourth-Party Logistics) markets due to increased demand for specialized logistics services, scalable solutions for fluctuating order volumes, and advanced technology integration. As e-commerce companies expand globally, the complexity of supply chains rises, requiring expertise in areas such as warehousing, transportation, order fulfilment, and last-mile delivery. According to the India Brand Equity Foundation (IBEF), India's e-commerce sector was valued at USD 52.57 billion in 2020, with projections indicating a growth to USD 350 billion by 2030. Similarly, retail e-commerce in the United States recorded revenue of USD 768 billion in 2021, with forecasts suggesting an increase to USD 1,329.7 billion by 2025. 3PL and 4PL providers offer tailored solutions, global reach, and technology-driven approaches to optimize logistics processes, enhance visibility, and meet the evolving needs of e-commerce operations efficiently. Thus, these aforementioned factors are propelling the growth of the Logistics Services (3PL & 4PL) Market during the estimated period. Moreover, the increasing focus on reducing the environmental impact of logistics operations, as well as the growing focus on utilizing cloud-based services in logistics management present various lucrative opportunities over the forecast years. However, the consolidation of 3PL and 4PL providers and the high capital expenditure for technology investments are challenging the market growth throughout the forecast period of 2023-2030.

The key regions considered for the Global Logistics Services (3PL & 4PL) Market study include Asia Pacific, North America, Europe, Latin America, and Middle East & Africa. Asia Pacific dominated the market in 2022 owing to the rising adoption of cloud computing and analytics platforms to enhance logistics performance through prompt feedback. Also, the growing need for integrated supply chain management solutions, coupled with the rising focus on the adoption of advanced technologies in logistics is resulting in the regional market expansion at a high growth rate. Whereas North America is expected to grow at a substantial CAGR over the forecast years. The growing demand for customized logistics services, as well as escalating demand for eco-friendly logistics solutions to tackle environmental challenges, are significantly propelling the market demand across the region. Additionally, the expansion of the e-commerce sector and the rise of online shopping trends in the U.S. and Canada are expected to drive market growth in the projected period.

Major market players included in this report are:

C.H. Robinson Worldwide Inc. (U.S.)

United Parcel Service, Inc. (UPS) (U.S.)

FedEx Corp. (U.S.)

Deutsche Post AG (Germany)

Kuehne+Nagel International AG (Switzerland)

A.P. Moller – Maersk (Denmark)

Schenker AG (Germany)

DSV Solutions (Denmark)

Nippon Express Holdings, Inc. (Japan)

Landstar System Holdings, Inc. (U.S.)

Recent Developments in the Market:

In November 2023, Kuehne+Nagel, a prominent player in logistics and transportation, declared the acquisition of Farrow, a Canadian freight forwarding company. This strategic move is aimed at bolstering Kuehne+Nagel's presence and operations in the North American logistics and transportation industry.

In August 2023, XPO Inc. announced an acceleration and expansion of its planned terminals and equipment additions to meet the increased demand for logistics operations globally. The company experienced a 9% rise in shipment delivery orders compared to the previous year in July 2023.

In February 2023, FourKites and RCS Logistics formed a collaborative venture to provide RCS customers with a comprehensive service offering detailed insights into their shipments across various transportation modes, including ocean, air, intermodal, and over-the-road (OTR). Leveraging FourKites' real-time supply chain data, RCS and its customers gain automatic and real-time visibility into the status and location of shipments worldwide.

In November 2022, A.P. Moller–Maersk introduced a new ocean shipping service called 'Shaheen Express.' The service operates on a rotation basis, covering Mundra, Pipavav, Jebel Ali, Dammam, Jebel Ali again, and returning to Mundra. This rotation provides a consistent and reliable service for the India-UAE-Saudi Arabia corridor, meeting the growing demand from customers involved in trade between the Indian and Gulf geographies.

Global Logistics Services (3PL & 4PL) Market Report Scope:

Historical Data – 2020 - 2021

Base Year for Estimation – 2022

Forecast period - 2023-2030

Report Coverage - Revenue forecast, Company Ranking, Competitive Landscape, Growth factors, and Trends

Segments Covered - Deployment Type, Mode of Transport, End Use, Region

Regional Scope - North America; Europe; Asia Pacific; Latin America; Middle East & Africa

Customization Scope - Free report customization (equivalent to up to 8 analysts' working hours) with purchase. Addition or alteration to country, regional & segment scope*

The objective of the study is to define the market sizes of different segments & countries in recent years and to forecast the values for the coming years. The report is designed to incorporate both qualitative and quantitative aspects of the industry within countries involved in the study.

The report also caters to detailed information about the crucial aspects such as driving factors & challenges that will define the future growth of the market. Additionally, it also incorporates potential opportunities in micro markets for stakeholders to invest along with a detailed analysis of the competitive landscape and product offerings of key players. The detailed segments and sub-segment of the market are explained below:

By Deployment Type:

On-Premise

Cloud-Based

By Mode of Transport:

Airways

Railways

Roadways

Waterways

By End Use:

Apparel & Footwear

Retail

Automobiles

Electronics

Agriculture

Building Materials

Pharmaceutical Products

Aircraft/Ships/Railways

Petrochemicals

Machinery

Others

By Region:

North America

U.S.

Canada

Europe

UK

Germany

France

Spain

Italy

ROE

Asia Pacific

China

India

Japan

Australia

South Korea

RoAPAC

Latin America

Brazil

Mexico

Middle East & Africa

Saudi Arabia

South Africa

Rest of Middle East & Africa

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