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Middle East Third-party Logistics Market Size, Share & Trends Analysis Report By Service (DTM, ITM, VAL), By Transport, By End Use (Retail, Manufacturing, Automotive), By Country, And Segment Forecasts, 2026 - 2033

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Abstracts

The Middle East third-party logistics market size was estimated at USD 86.11 billion in 2025 and is projected to reach USD 174.37 billion by 2033, growing at a CAGR of 9.3% from 2026 to 2033. The Middle East third-party logistics market is gaining momentum, driven by rising demand from retail, healthcare, FMCG, and automotive sectors across the GCC and Levant regions.

Rapid growth in e-commerce, increasing re-export trade, and the expansion of free zones are fueling the need for advanced warehousing, distribution, and last-mile delivery solutions. Investments in bonded warehouses, smart fulfilment centres, and multimodal transport corridors, linking ports such as Jebel Ali, Khalifa, and Dammam with regional hubs, are improving speed and reliability.

Adoption of digital tools, including real-time shipment tracking, warehouse automation, and data-driven inventory management, is enhancing operational efficiency. However, regulatory variations across countries, high logistics costs, and limited availability of trained logistics professionals continue to pose challenges for market expansion.The Middle East e-commerce sector is experiencing rapid growth across the GCC and Levant regions, led by countries including the UAE, Saudi Arabia, and Kuwait. The increase in online shopping is supported by widespread smartphone penetration, the adoption of digital payments, and the rise of social commerce platforms. In Saudi Arabia, e-commerce sales grew by over ~31% in 2024, driven by the FMCG, electronics, and fashion sectors. This growth is fueling demand for reliable third-party

logistics providers capable of managing high-volume, time-sensitive last-mile deliveries, reverse logistics, and fulfilment operations. Regional players such as Aramex, Fetchr, and DHL are expanding dedicated e-commerce hubs and same-day delivery services to meet increasing consumer expectations, making e-commerce a key driver for 3PL adoption in the Middle East.

Logistics infrastructure investments are accelerating across the Middle East, enhancing 3PL capabilities. Strategic developments in Dubai South, Jebel Ali Free Zone, Khalifa Port, and King Abdullah Economic City provide bonded warehouses and smart fulfilment centres that simplify customs clearance, storage, and regional distribution. Multimodal transport corridors, such as the planned GCC railway network and Saudi Arabia's North-South railway, improve connectivity between ports, airports, and inland hubs. 3PL providers like Kuehne + Nagel, Expeditors, and CEVA Logistics are leveraging these infrastructures to offer integrated logistics solutions that combine warehousing, freight forwarding, and last-mile delivery. These investments enhance speed, reliability, and cross-border trade efficiency, particularly in sectors such as automotive, healthcare, and FMCG.

Digitalization presents significant growth opportunities for 3PL providers in the Middle East. The use of IoT sensors, RFID tracking, warehouse management systems (WMS), AI-powered demand forecasting, and autonomous robotics enables higher operational efficiency and transparency. DHL, Aramex, and Kuehne + Nagel have implemented smart warehouses in the UAE and Saudi Arabia featuring automated sorting, robotic picking, and real-time inventory monitoring. Predictive analytics and digital platforms optimize routes, reduce delivery delays, and provide customers with enhanced visibility. The adoption of these technologies is particularly critical for e-commerce, FMCG, and healthcare supply chains, where speed, accuracy, and traceability are essential, creating opportunities for 3PL providers to differentiate and scale operations.

The Middle East 3PL market faces challenges due to high operational costs and a shortage of trained logistics personnel. Transportation costs, fleet maintenance, customs handling, and port fees contribute to elevated logistics expenses. Cross-border trucking within the GCC, for instance, can incur significant tolls, fuel, and regulatory compliance costs. Additionally, there is a limited pool of professionals skilled in warehouse automation, digital logistics, and supply chain management, forcing companies to rely on expatriates or invest in intensive training programs. These factors increase operating costs and can limit the speed of service expansion, constraining the overall growth potential of the 3PL market in the region.

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Middle East Third-party Logistics Market Report Segmentation

This report forecasts revenue growth at and country levels and provides an analysis of the latest industry trends in each of the sub-segments from 2021 to 2033. For this study, Grand View Research has segmented the Middle East third-party logistics market report based on service, transport, end-use, and country.

Service Outlook (Revenue, USD Million, 2021 - 2033)

Dedicated Contract Carriage (DCC)/Freight forwarding

Domestic Transportation Management (DTM)

International Transportation Management (ITM)

Warehousing & Distribution (W&D)

Value Added Logistics Services (VALs)

Transport Outlook (Revenue, USD Million, 2021 - 2033)

Roadways

Railways

Waterways

Airways

End Use Outlook (Revenue, USD Million, 2021 - 2033)

Manufacturing

Retail

Healthcare

Automotive

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Others

Country Outlook (Revenue, USD Million, 2021 - 2033)

UAE

Kingdom of Saudi Arabia (KSA)

Qatar

Oman

Kuwait

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