

2018 Top 5 Logistics Services (3PL & 4PL) Players in North America, Europe, Asia-Pacific, South America, Middle East and Africa

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Abstracts

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The 3PLs of today can provide a much broader range of services than they used to. It used to be that their primary focus was on warehousing and shipping, so if you sent them your product they would store it and ship it for you. Now, 3PLs can handle almost your entire business. This includes not only the complete supply chain cycle, but also such functions as customer service, order management, sales support, ecommerce and IT integration. In fact, there are very few aspects of your business that a 3PL can't take care of for you and in many cases, they have technology and resources that you may not, so you get the benefit of top-tier tech without the investment.

A 4PL is an independent, singularly accountable, non-asset based integrator of clients' supply and demand chains. The 4PL's role is to implement and manage a value creating business solution through control of time and place utilities and influence on form and possession utilities within the client organization. Performance and success of the 4PL's intervention is measured as a function of value creation within the client organization.

The logistics market is large, fragmented and populated by a wide range of differing companies. There are multinational companies offering a comprehensive range of logistics services leading the industry, down to smaller national freight forwarders, offering simple logistics services. The market has been driven by consolidation over the last 20 years, with customers seeking fewer, larger providers that are able to manage complex supply chains on a global basis.

Market growth has been driven by both increased economic activity and the continued trend in outsourcing of logistics activities to third-parties, both new outsourcers and companies outsourcing more activities to third-parties. The largest region in terms of outsourced logistics market size is Asia Pacific, followed by Europe and North America, with the Asia Pacific region having experienced faster growth in logistics market value than other regions. Outsourcing penetration is highest in Europe, but levels are increasing quickly in Asia Pacific. Key Trends The trend of outsourcing business processes and supply chain activities continues to be a driver of logistics company revenues and hence market growth. The growth of e-commerce is also creating an environment where supply chains are adapting to new models. Ecommerce is driving further logistics outsourcing to third-party supply chain specialists.

Dedicated e-commerce warehousing and distribution contracts are increasingly being awarded to logistics providers. A key trend in the global logistics industry is the provision of value-added services and bespoke solutions. Logistics providers are increasing their focus on specific industry sectors such as high-technology, automotive and pharmaceuticals, and offering additional value-added services that make their services more relevant for client needs. New technologies are finding their way into logistics services in order to improve productivity and enhance service. New logistics technologies being developed include vehicle management software, self-driving vehicles, robotics, internet of things applications and augmented reality. The largest logistics providers are characterized by differing service lines, asset ownership models, geographical scope and types of customers they serve.

The top three groups are all based in Europe: DHL is the largest provider globally, followed by Kuehne & Nagel and DB Schenker Logistics. All three have grown slower than the market in recent years as they have consolidated the major acquisitions made in the past. Most, but not all, of the leading logistics providers operate on a global scale, covering more than one continent. Some have a significant presence in all regions (ie Europe, Americas, Asia Pacific and Middle East / Africa). There has been significant mergers and acquisitions activity in the global logistics industry.

Over the next five years, LPI(LP Information) projects that Logistics Services (3PL & 4PL) will register a 1.9% CAGR in terms of revenue, reach US\$ 880 million by 2023, from US\$ 790 million in 2017.

This report studies the global market, especially in North America, Europe, Asia-Pacific, South America, Middle East and Africa, focuses on the top 5 players in each region, with sales, price, revenue and market share from 2013 to 2018, the top players:

DHL Supply Chain & Global Forwarding

Kuehne + Nagel

DB Schenker Logistics

Nippon Express

C.H. Robinson Worldwide

UPS Supply Chain Solutions

DSV

Sinotrans

CEVA Logistics

Expeditors International of Washington

Dachser

Panalpina

GEODIS

Toll Holdings

J.B. Hunt (JBI, DCS & ICS)

Hitachi Transport System

XPO Logistics

GEFCO

Yusen Logistics

Agility

Market Segment by Regions, this report splits Global into several key Regions, with sales, revenue, market share of top players in these regions, from 2013 to 2018 (forecast), like

North America (United States, Canada and Mexico)

Asia-Pacific (China, Japan, Southeast Asia, India and Korea)

Europe (Germany, UK, France, Italy and Russia etc.)

South America (Brazil, Chile, Peru and Argentina)

Middle East and Africa (Egypt, South Africa, Saudi Arabia)

Split by Product Types, with sales, revenue, price, market share of each type, can be divided into

Transportation

Warehousing

Value-added Services

Lead Logistics Provider Services/4PL

Other

Split by applications, this report focuses on sales, market share and growth rate in each application, can be divided into

Consumer Goods

Healthcare

Industrial

Elements

Food, Groceries

Automotive

Technological

Retailing

Other

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