

Last-Mile Delivery Market Assessment, By Delivery Mode [Regular Delivery, Same-Day Delivery, Express Delivery, Others], By Service Type [Business-to-Consumer (B2C), Business-to-Business (B2B), Customer-to-Customer (C2C)], By Vehicle Type [Two-Wheeler, Three-Wheeler, Four-Wheeler, Others], By Mode of Operation [Non-Autonomous, Autonomous], By Application [E Commerce, Retail and FMCG, Healthcare, Mails and Packages, Others], By Region, Opportunities and Forecast, 2017-2031F

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Abstracts

Global last-mile delivery market is projected to witness a CAGR of 9.1% during the forecast period 2024-2031, growing from USD 140.5 billion in 2023 to USD 282.02 billion in 2031. The market has experienced significant growth in recent years and is expected to maintain a strong pace of expansion in the coming years. The global last-mile delivery market is experiencing unprecedented growth, fueled by the surge in e-commerce, shifting consumer preferences, and technological advancements. As online shopping becomes increasingly ubiquitous, consumers demand faster, more reliable, and sustainable delivery solutions.

Key market drivers include the rapid growth of the e-commerce sector, rising expectations for swift and convenient deliveries, and the impact of the COVID-19 pandemic, which has accelerated the digital transformation of retail. Innovations in technology play a pivotal role in shaping the last-mile delivery landscape. Route optimization algorithms, real-time tracking systems, and automation technologies

enhance the efficiency and accuracy of deliveries. Drones and autonomous vehicles are emerging as futuristic solutions, offering the potential to revolutionize the last-mile delivery process. Additionally, predictive analytics and artificial intelligence enable companies to anticipate consumer behavior, optimize inventory management, and streamline delivery operations. The integration of sustainable practices, such as electric vehicles and eco-friendly packaging, reflects a growing emphasis on environmental responsibility in the last-mile delivery market.

Sustainable and Eco-Friendly Delivery Practices

Sustainable and eco-friendly delivery practices have emerged as imperative considerations in the global last-mile delivery market. With increased environmental awareness, consumers and businesses alike are prioritizing green logistics solutions to mitigate the environmental impact of deliveries. Companies are adopting electric vehicles, optimizing delivery routes for fuel efficiency, and exploring alternative fuels to reduce carbon emissions. Packaging innovations focusing on recyclability and minimal waste contribute to eco-conscious operations. Additionally, the integration of renewable energy sources and the commitment to carbon-neutral initiatives are becoming defining factors for businesses striving to align their last-mile delivery practices with sustainability goals. This emphasis on environmental responsibility addresses ecological concerns and aligns with changing consumer expectations for ethical and environmentally friendly supply chain operations.

For example, Amazon launched its global last-mile fleet program in India in November 2023, which is a global first for the company. The program enables Delivery Service Partners (DSPs) to lease a fleet of customized three-wheeler electric vehicles (EVs) through a fleet management company. The EVs are designed for Amazon deliveries and are zero-emission, safe, and reliable. The program also assists DSPs in maintaining, charging, and parking these EVs.

Technological Advancements

Technological advancements are revolutionizing the global last-mile delivery market, reshaping how goods reach consumers. Artificial intelligence and machine learning algorithms optimize route planning, minimizing delivery times and costs. Real-time tracking systems provide enhanced visibility, improving customer experience and transparency. The integration of drones and autonomous vehicles holds immense potential for faster and more efficient deliveries, especially in urban areas. Smart sensors enable real-time monitoring of package conditions, ensuring the safe transport

of sensitive goods. Additionally, advancements in data analytics contribute to demand forecasting and inventory management, further enhancing the overall efficiency and responsiveness of last-mile delivery operations globally. These innovations collectively empower logistics providers to meet the increasing demands of consumers in the evolving landscape of e-commerce and urbanization.

Surge in E-Commerce

The global last-mile delivery market has witnessed an unprecedented surge in e-commerce, reshaping the landscape of how products reach consumers. With the exponential growth of online retail, there is an intensified demand for efficient and timely last-mile delivery services. The convenience of shopping from home, coupled with a wide array of online products, has propelled this surge. The COVID-19 pandemic further accelerated the adoption of e-commerce, as lockdowns and safety concerns led more consumers to turn to online shopping. This surge in e-commerce activities has become a pivotal driver, compelling companies to innovate and optimize their last-mile logistics to meet the evolving expectations of consumers for swift, reliable, and seamless delivery experiences.

For instance, in 2022, UPS acquired Delivery Solutions, a Texas-based Software-as-a-Service (SaaS) company that offers a delivery orchestration platform for retailers. The acquisition aimed to enhance UPS's capabilities in e-commerce last-mile delivery. Delivery Solutions' platform enables retailers to access various delivery options, including same-day delivery, shipping from store and distribution centers, curbside and in-store pickup, and post-purchase customer experience management. The current Delivery Solutions team will remain in place, and the company will continue to operate as an agnostic, multi-carrier platform under the same name.

Growth of Last-Mile Delivery in the Healthcare Sector

The last-mile delivery sector in the healthcare industry is experiencing robust growth on a global scale. The demand for timely and secure transportation of pharmaceuticals, medical equipment, and healthcare supplies has intensified, driven by the industry's increasing reliance on e-commerce and a focus on patient-centric care. Rapid advancements in cold chain logistics and temperature-controlled delivery solutions ensure safe transportation of sensitive medications and vaccines. The integration of technology, including real-time tracking and traceability, enhances the efficiency and transparency of healthcare last-mile deliveries. As the healthcare sector continues to evolve, last-mile delivery solutions are playing a critical role in meeting the dynamic

needs of patients and healthcare providers, contributing to the overall transformation of the healthcare supply chain.

For example, in October 2023, Drone Delivery Canada Corp. announced a partnership with Halton Healthcare, facilitated by its sales agent Air Canada, to implement a two-way drone delivery route between Milton District Hospital and Oakville Trafalgar Memorial Hospital. This initiative aims to enhance the transportation of medical supplies and samples between the two hospitals, thereby improving overall healthcare operational efficiency. The agreement, dated September 26, 2023, marks a significant step in leveraging drone technology for the healthcare sector, with the potential to reduce transportation times and enhance the security of medical samples.

Future Market Scenario (2024 – 2031F)

Automation, including drones and autonomous vehicles, will likely become more prevalent, enhancing delivery speed and efficiency.

Sustainable practices, such as electric vehicles and eco-friendly packaging, will gain prominence due to increased environmental awareness.

Real-time tracking and advanced analytics will further optimize delivery routes and enhance overall operational efficiency.

Additionally, partnerships and collaborations between logistics providers and e-commerce platforms may strengthen, fostering a more integrated and seamless last-mile delivery ecosystem. As e-commerce continues to thrive, the last-mile delivery market is poised for sustained growth, with a focus on meeting consumer expectations for faster, reliable, and eco-conscious delivery solutions.

Key Players Landscape and Outlook

The global last-mile delivery market is characterized by key players at the forefront of shaping its dynamics. Industry giants such as UPS, FedEx and Amazon Logistics dominate the landscape with extensive networks, advanced technologies, and a relentless focus on meeting the rising demands of e-commerce. These companies continue to invest in innovations like automated delivery vehicles, drone deliveries, and artificial intelligence to enhance efficiency and reduce delivery times. The outlook for the global last-mile delivery market remains promising, driven by the ongoing e-commerce

boom, technological advancements, and the constant pursuit of streamlined, sustainable solutions by these key players, ensuring a competitive and rapidly evolving market landscape.

For instance, in October 2023, XPO, a leading freight transportation provider in North America, launched an in-house over-the-road operation exclusively staffed by team drivers. The program, called Road Flex, is part of XPO's previously announced strategy to insource third-party linehaul carrier miles. The goal of the program is to drive greater efficiency, cost savings, and better service for customers. The Road Flex program is already underway with sleeper teams running from bases in Dallas, Texas, and Phoenix, Arizona. XPO expects to expand the program to other locations in the future.

For instance, in August 2023, A2Z Drone Delivery unveiled its revamped last-mile drone, the RDST Longtail, which can fly in rain. The updated RDST Longtail is available in standard and premium configurations, both equipped with the company's RDS2 delivery system.

For instance, in September 2022, Power Link Expedite, a same-day courier and expedited company based in Milton, Ontario, acquired Kaide X Transportation Services, a Burlington-based company that offers truckload, LTL, and warehousing services.

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*Companies mentioned above DO NOT hold any order as per market share and can be changed as per information available during research work

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