

# Global Logistics Services (3PL & 4PL) Market Professional Survey Report 2018

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## Abstracts

This report studies the global Logistics Services (3PL & 4PL) market status and forecast, categorizes the global Logistics Services (3PL & 4PL) market size (value & volume) by manufacturers, type, application, and region. This report focuses on the top manufacturers in North America, Europe, Japan, China, India, Southeast Asia and other regions (Central & South America, and Middle East & Africa).

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.

The global Logistics Services (3PL & 4PL) market is valued at 790 million US\$ in 2017 and will reach 910 million US\$ by the end of 2025, growing at a CAGR of 1.8% during 2018-2025.

The major manufacturers covered in this report

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

Geographically, this report studies the top producers and consumers, focuses on product capacity, production, value, consumption, market share and growth opportunity

in these key regions, covering

North America

Europe

China

Japan

India

Southeast Asia

Other regions (Central & South America, Middle East & Africa)

We can also provide the customized separate regional or country-level reports, for the following regions:

North America

United States

Canada

Mexico

Asia-Pacific

China

India

Japan

South Korea

Australia

Indonesia

Singapore

Rest of Asia-Pacific

Europe

Germany

France

UK

Italy

Spain

Russia

Rest of Europe

Central & South America

Brazil

Argentina

Rest of South America

Middle East & Africa

Saudi Arabia

Turkey

Rest of Middle East & Africa

On the basis of product, this report displays the production, revenue, price, market share and growth rate of each type, primarily split into

Transportation

Warehousing

Value-added Services

Lead Logistics Provider Services/4PL

Other

By Application, the market can be split into

Consumer Goods

Healthcare

Industrial

Elements

Food, Groceries

Automotive

Technological

Retailing

Other

The study objectives of this report are:

To analyze and study the global Logistics Services (3PL & 4PL) capacity, production, value, consumption, status (2013-2017) and forecast (2018-2025);

Focuses on the key Logistics Services (3PL & 4PL) manufacturers, to study the capacity, production, value, market share and development plans in future.

Focuses on the global key manufacturers, to define, describe and analyze the market competition landscape, SWOT analysis.

To define, describe and forecast the market by type, application and region.

To analyze the global and key regions market potential and advantage, opportunity and challenge, restraints and risks.

To identify significant trends and factors driving or inhibiting the market growth.

To analyze the opportunities in the market for stakeholders by identifying the high growth segments.

To strategically analyze each submarket with respect to individual growth trend and their contribution to the market.

To analyze competitive developments such as expansions, agreements, new product launches, and acquisitions in the market.

To strategically profile the key players and comprehensively analyze their growth strategies.

In this study, the years considered to estimate the market size of Logistics Services (3PL & 4PL) are as follows:

History Year: 2013-2017

Base Year: 2017

Estimated Year: 2018

Forecast Year 2018 to 2025

For the data information by region, company, type and application, 2017 is considered as the base year. Whenever data information was unavailable for the base year, the prior year has been considered.

#### Key Stakeholders

Logistics Services (3PL & 4PL) Manufacturers

Logistics Services (3PL & 4PL) Distributors/Traders/Wholesalers

Logistics Services (3PL & 4PL) Subcomponent Manufacturers

Industry Association

Downstream Vendors

#### Available Customizations

With the given market data, QYResearch offers customizations according to the company's specific needs. The following customization options are available for the report:

Regional and country-level analysis of the Logistics Services (3PL & 4PL) market, by end-use.

Detailed analysis and profiles of additional market players.



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