

Connected Logistics Market – Global Vertical Size, Share, Trends, Opportunity, and Forecast Segmented By Component (Hardware, Software, Services), By Transportation Mode (Roadways, Railways, Airways, Waterways), By Vertical (Manufacturing, Automotive, Food and Beverages, Consumer Goods and Retail, Oil & Gas, Travel and Hospitality, Healthcare and Pharmaceuticals, and Others), By Region, By Competition, 2018-2028.

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Abstracts

Global Connected Logistics Market has valued at USD 16.28 Billion in 2022 and is anticipated to project robust growth in the forecast period with a CAGR of 14.48% through 2028. A third-party logistics company (3PL) is a service provider that either arranges or handles a variety of supply chain functions for a business. These functions can include brokering, shipping, storing, or packing a company's freight, as well as supply chain strategy and access to technology. A 3PL (third-party logistics) provider manages all aspects of fulfillment, from warehousing to shipping. A 4PL (fourth-party logistics) provider manages a 3PL on behalf of the customer and other aspects of the supply chain. 3PLs perform the functions of warehousing, distribution, transportation, returns management and consolidation with expertise. Excellent 3PL partners have the potential to propel your company to incredible heights in the long run.

Key Market Drivers

Adoption Of Third-Party Logistics (3PL)

Connected Logistics is a partner or service that assists manufacturers, especially ecommerce merchants, to outsource activities related to logistics and distribution. A third-party logistics company provides specialized services such as inventory management, cross-docking, door-to-door delivery, and packaging of products. This, in turn, aids enterprises in providing a better customer experience, ensuring scalability, mitigating the risks of product damage, promoting business growth and market expansion, and enabling the completion of core business operations. Furthermore, the third-party logistics model delivers greater asset utilization and asset sharing alliances, which increases its demand, and contributes toward the growth of the 3PL market. At present, third-party logistics is commercially available in varying transportation modes and service types, including dedicated contract carriage (DCC), domestic and international transportation management.

Companies that provide international deliveries typically work with two or three dozen delivery partners specializing in different geographic areas. Large e-commerce companies, such as Amazon, have huge in-house teams that act as their third-party logistics. They spend a lot of money and effort managing, controlling, and improving their logistics. Moreover, Kestreaa, a Brazilian logistics startup, raised USD 2.7 million funding from Canary Ventures and various angel investors for logistics software. Kestreaa is a cloud-based B2B solution for freight-management, connecting ship-owners, cargo agents, freight forwarders, government systems, and more. The software allows stakeholders to manage their shipments, anticipate delays, and optimize on delivery time. Customers are also able to monitor the delivery process of their goods.

In addition, growth in automotive industry, technological advancement, surge in last-mile connectivity, and rise in cross-border trade activities also boost the growth of the 3PL market. For instance, the Indian government launched Multi-Modal Logistics Parks Policy (MMLPs) to improve the logistics sector of the country. Meanwhile, the Union Minister of Commerce and Vertical announced a plan to invest \$500 billion in the logistics sector by 2025. The government also launched a National Logistics Portal to serve as a transactional e-marketplace by connecting buyers, logistics service providers, and relevant government agencies.

Logistics Vertical Has Undergone Several Rapid Changes in Recent Years

The logistics Vertical has undergone several rapid changes in recent years. The trends that began and accelerated in 2020 continued in 2021 and 2022, with increased demand for home delivery and higher consumer expectations than ever before. At the same time, 2022 presented its own set of challenges in terms of inflation, economic

volatility, and ongoing supply chain disruptions. Despite the major disruptions of 2022, there are still many major trends that have continued (and will continue) unabated. Amazon, for example, increased its dominance by heavily investing in its in-house logistics capabilities.

Nowadays, shippers want to make more data-driven decisions. As a result, 3PL firms must brace themselves for clients who expect analytics expertise. According to one recent study, 94% of shippers believe analytics are required to ensure complete and on-time order fulfillment and package visibility. 3PLs will increasingly need to focus on generating more analytical insights across their operations, for example, by establishing data science capabilities and teams to provide useful insights to their clients and internal teams. Strong data and clear strategies will assist third-party logistics providers in providing shippers with improved traceability and end-to-end visibility across the supply chain. Aside from collecting more data, businesses must prioritize cybersecurity and have data protection plans in place.

Key Market Challenges

Globalization and Geopolitical Factors

One of the most prominent complexities in supply chain management is the globalization of markets. Companies now operate in a global landscape, where suppliers, manufacturers, and customers can be located anywhere in the world. Geopolitical factors, such as trade disputes, tariffs, and political instability, can disrupt the smooth flow of goods and introduce uncertainty into the supply chain. 3PL providers must stay informed about these factors and develop strategies to mitigate their impact.

Demand Volatility: Rapid changes in consumer preferences, seasonality, and external events like the COVID-19 pandemic can lead to significant fluctuations in demand. This volatility requires 3PL providers to be agile and adaptable, capable of quickly adjusting transportation and inventory strategies to meet shifting customer needs. Balancing the need to have sufficient inventory to meet demand while minimizing carrying costs and the risk of obsolescence is a perpetual challenge. Advanced technologies like artificial intelligence and data analytics are becoming increasingly crucial for optimizing inventory levels and ensuring on-time delivery. Building and maintaining strong relationships with suppliers and vendors is essential for a smooth supply chain. 3PL providers often act as intermediaries between manufacturers and suppliers, necessitating effective communication and collaboration to prevent disruptions.

Regulatory Compliance

The global supply chain is subject to a myriad of regulations, including those related to customs, safety, environmental standards, and labor practices. Staying compliant with these regulations is a significant challenge, and non-compliance can result in fines, delays, and damage to a company's reputation.

Technological Advancements

While technology offers solutions to many supply chain challenges, it also presents challenges of its own. Keeping up with the latest technological trends, integrating new systems into existing operations, and ensuring data security are ongoing concerns for 3PL providers.

Environmental Sustainability

The pressure to reduce the environmental impact of supply chain operations is growing. This involves minimizing carbon emissions, reducing waste, and adopting sustainable sourcing practices. Achieving sustainability goals while maintaining cost-effectiveness is a delicate balance. The explosive growth of e-commerce has placed additional demands on supply chains. Consumers now expect fast and affordable shipping, leading to the need for more sophisticated last-mile delivery solutions and efficient fulfillment processes.

Key Market Trends

The importance of last-mile delivery is well-known to logistics service providers. However, many people are unaware that final mile operations will be a game changer in the coming years. Last-mile deliveries have already dethroned price and product as key differentiators in shopper purchasing decisions. Last-mile delivery is critical for both retaining and acquiring new customers. Simply put, last-mile operations can make or break a company. This has been one of the most important logistics trends for several years, and it shows no signs of abating. More 3PL companies are working to reduce last-mile delivery distances by locating fulfillment hubs in more accessible locations, such as urban centers.

Customer retention is one of the most difficult challenges in a highly competitive market,

driving businesses to embrace greater picking efficiency, smart inventory management, and rapid replenishment of hot-selling items. The supply chain and logistics domains are being transformed by fast data and strong network connectivity. Warehouse management systems (WMS) of today have extensive computing power, large amounts of data storage, and the ability to connect to other critical applications such as enterprise resource planning (ERP) and customer relationship management (CRM). It is no longer enough to simply track shipments; businesses must optimize every step of the process, from raw materials to the production line, marketing, and delivery of the product to the end customer.

Growth in E-commerce Sales Driving the Market

On the fulfillment front, all shippers have a set of performance metrics or key performance indicators (KPIs) to work toward. In today's fast-paced fulfillment environment, meeting these targets can be difficult, especially if fulfillment is not a core competency for the shipper. Knowing this, the Connected Logistics Vertical has stepped up its game, offering a broader portfolio of services to a broader range of customers. Once the domain of extremely high-volume operations, even small businesses selling clothing online recognize the value of outsourcing some or all of their fulfillment operations to a reputable third party. The e-commerce boom has prompted more businesses to investigate 3PL options.

E-commerce shippers are increasingly turning to 3PL providers to help them meet changing customer expectations and deal with supply chain disruption, labor constraints, transportation issues, inflation, and other challenges that have become the 'new normal' in today's operating environment. As a result, 3PLs are offering shippers strategic locations, more space to accommodate higher inventory volumes, and a wider range of delivery options. As the volume of returns has increased in the last year, e-commerce shippers want to work with 3PLs that can help customers with the returns process. Omni-channel logistics services are also in high demand, with automation serving as a critical component of e-commerce fulfillment processes.

The larger 3PLs have multiple e-commerce operations, such as Geodis, DHL, Ryder, and JD Logistics (in Asia), to name a few of the larger players. Smaller providers have followed suit and now offer e-commerce fulfillment as well. In most cases, these 3PLs have e-commerce fulfillment operations separate from their traditional business-to-business (B2B) warehousing operations. More 3PLs will be needed in the future to add value in the last mile of the supply chain, where getting large and bulky items from the final point of distribution to the customer's location remains a major challenge. Getting

furniture, fitness equipment, and other large items to customers' doors requires extra planning, especially if they require quick delivery.

Segmental Insights

Hardware Insights

The hardware segment dominated the market in 2022 and is expected to expand at the fastest CAGR during the forecast period. Based on the hardware, the market is further segmented into RFID tags, sensors, communication devices, tracking devices, and others. Due to the increasing demand to track assets, the sensors category is anticipated to witness a significant market share. Additionally, Internet of Things (IoT) based connected sensing technology aids in preserving temperature stability and reducing food waste while improving supply chain visibility.

In addition, the software segment is anticipated to register a considerable CAGR during the forecast period. The warehouse management software automates and optimizes several warehouse processes, such as tracking, receiving, storing inventory, and workload planning, among others. The fleet management software offers a comprehensive range of vehicle management features to owners of cargo ships, aircraft, trucks, and other transport vehicles across the globe. Asset tracking and management provide tracking of fixed assets, inventory tools, and other important physical assets. Data management and analytics offer solutions to improve and measure end-to-end logistics performance.

Transportation Insights

In terms of transportation mode, the roadways segment dominated the market in 2022. It is anticipated to expand at the fastest CAGR through the forecast period. This can be attributed to the rising need for road-based transportation for transporting retail goods across long distances, particularly for last-mile delivery. Additionally, this mode of transport offers a large carrying capacity, which makes it a preferred choice for logistics. The increasing efforts taken by governments across the globe to promote road transport are also contributing to segment growth.

For instance, the government of India has introduced a national logistics policy to facilitate the ease of doing business and reduce transportation costs. As part of this initiative, the government is constructing a highway network from the port area to the remote site of the country to reduce fuel consumption, which is considered the most

cost-impacting factor in freight transport.

Regional Insights

The North America region has established itself as the leader in the Global Connected Logistics Market with a significant revenue share in 2022. North America, led by the United States, has one of the largest and most developed economies in the world. The region's economic strength translates into higher consumer spending, increased manufacturing activities, and extensive trade networks, all of which contribute to a robust demand for logistics and supply chain services.

Key Market Players

Geodis

DHL International GmbH

db Schenker

a.p. moller - maersk, Kuehne+Nagel Inc.

XPO Logistics Inc.

C.H. Robinson Worldwide, Inc.

FedEx Corporation

United Parcel Service of America, Inc.

DSV

Report Scope:

In this report, the Global Connected Logistics Market has been segmented into the following categories, in addition to the Vertical trends which have also been detailed below:

Global Connected Logistics Market, By Component :

Hardware

Software

Services

Global Connected Logistics Market, By Transportation:

Roadways

Railways

Airways

Waterways

Global Connected Logistics Market, By Vertical

Manufacturing

Automotive

Food and Beverages

Consumer Goods and Retail

Oil & Gas

Travel and Hospitality

Healthcare & Pharmaceuticals

Others

Global Connected Logistics Market, By Region:

North America

United States

Canada

Mexico

Asia-Pacific

China

India

Japan

South Korea

Indonesia

Europe

Germany

United Kingdom

France

Russia

Spain

South America

Brazil

Argentina

Middle East & Africa

Saudi Arabia

South Africa

Egypt

UAE

Israel

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Global Connected Logistics Market.

Available Customizations:

Global Connected Logistics Market report with the given market data, Tech Sci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

Company Information

Detailed analysis and profiling of additional market players (up to five).

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