

Pharmaceutical Third-Party Logistics Market Size, Share and Growth Outlook 2026: By Service Type, By Temperature Control, By Product Type, By End User, Companies to 2034

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Abstracts

The global Pharmaceutical Third-Party Logistics Market size is forecast to increase from \$79.81 Billion in 2026 to \$146.31 Billion in 2034 at a CAGR of 7.87% between 2026 and 2034.

The Pharmaceutical Third-Party Logistics market report provides detailed analysis and outlook of Pharmaceutical Third-Party Logistics segments including By Service Type (Transportation, Value-Added Warehousing and Distribution, Specialized and Secondary Services), By Temperature Control (Ambient / Non-Cold Chain, Cold Chain), By Product Type (Prescription / Branded Drugs, Generic Drugs, Biopharmaceuticals, Biosimilars, and Vaccines, Cell and Gene Therapies, Other Products), By End User (Pharmaceutical and Biotech Manufacturers, Hospitals, Pharmacies, and E-Commerce Channels, Clinical Trial and Research Sponsors) across global and regional markets. Further, analysis and outlook across 21 countries in North America, Europe, Asia Pacific, Middle East, Africa, and South America are provided in the study.

Pharmaceutical Third-Party Logistics (3PL) Industry Overview

Cold Chain Expansion and Specialized Logistics Are Transforming Pharmaceutical Supply Chains

The pharmaceutical third-party logistics (3PL) industry is evolving rapidly as pharmaceutical manufacturers increasingly outsource complex logistics operations to specialized providers capable of managing temperature-sensitive, high-value

therapeutics. Growing demand for biologics, vaccines, cell and gene therapies, and personalized medicines is accelerating investments in validated cold-chain infrastructure, multimodal transportation, and digitally monitored distribution networks. Logistics providers are strengthening global capabilities through dedicated pharmaceutical transportation routes, temperature-controlled warehousing, and real-time shipment visibility to ensure product integrity, regulatory compliance, and uninterrupted delivery across international healthcare supply chains.

Strategic Infrastructure Investments Are Strengthening Global Cold Chain Networks

Leading logistics providers continue expanding dedicated pharmaceutical infrastructure to improve distribution efficiency and temperature control. DHL Global Forwarding strengthened its life sciences logistics capabilities by launching a dedicated temperature-controlled air freight connection between Brussels Airport and Cincinnati/Northern Kentucky International Airport as part of its broader investment strategy supporting pharmaceutical and biotechnology supply chains. The specialized route enhances secure transportation for products requiring strict 2–8°C temperature control, including biopharmaceuticals and advanced cell and gene therapies. UPS Healthcare further expanded global cold-chain capacity through a \$48 million investment establishing 27 temperature-controlled cross-dock facilities across the Americas, Europe, and Asia. These strategically located facilities accelerate transfers between air and ground transportation while maintaining validated refrigerated and frozen storage conditions that protect sensitive pharmaceutical products throughout transit.

End-to-End Supply Chain Excellence Driving Competitive Differentiation

The pharmaceutical logistics industry is increasingly competing on specialized capabilities rather than conventional transportation services alone. Service providers are integrating temperature management, supply chain visibility, regulatory compliance, and rapid distribution into comprehensive logistics solutions tailored for life sciences customers. Reflecting this strategic direction, Kuehne+Nagel strengthened its position within the pharmaceutical logistics sector through its title sponsorship of the Pharma Industry Awards UK 2026, highlighting its continued emphasis on maintaining supply chain integrity, temperature-controlled transportation, and rapid delivery for high-value pharmaceutical products. As pharmaceutical pipelines continue shifting toward increasingly complex biologics and specialty medicines, third-party logistics providers are investing in specialized infrastructure, validated cold-chain operations, and integrated logistics ecosystems that support secure, compliant, and reliable global pharmaceutical distribution.

Pharmaceutical Third-Party Logistics Market Trends, Growth Drivers, Competitive Landscape, and Future Opportunities

The global Pharmaceutical Third-Party Logistics market is witnessing increasing investments in innovation, product development, digital transformation, artificial intelligence integration, healthcare infrastructure expansion, and strategic partnerships across developed and emerging economies. Key Companies in the industry include- DHL International GmbH, FedEx Corporation, United Parcel Service (UPS), Kuehne + Nagel International AG, Cencora, Inc. , SF Express, Agility Public Warehousing Co. K.S.C.P., McKesson Corporation, Cardinal Health, DSV. The Pharmaceutical Third-Party Logistics market is expected to remain one of the most closely watched segments in the global healthcare industry, with companies focusing on niche market segments. As healthcare systems across the US, Europe, Asia-Pacific, Latin America, and Middle East & Africa continue to prioritize efficiency, access, and innovation, the Pharmaceutical Third-Party Logistics industry outlook remains shaped by rising healthcare expenditure, demographic change, digital transformation, and product innovation.

The report provides detailed market analysis including-

- Growth Pharmaceutical Third-Party Logistics Market size outlook across 3 scenarios- High growth, reference, and Low growth cases

- Market Trends, Drivers, Potential Opportunities, and Challenges faced by Pharmaceutical Third-Party Logistics companies

- Porter's Five forces analysis- Bargaining power of buyers and sellers, Threat of Substitutes and new entrants, and Intensity of competitive rivalry

- Detailed SWOT Analysis of global and regional Pharmaceutical Third-Party Logistics markets

- Competitive analysis including business description, product analysis, and financial profiles

- Key country specific analysis detailing key factors shaping the short-term and long-term outlook

Recent industry developments and news including mergers, acquisitions, product launches, expansions, and company announcements

Pharmaceutical Third-Party Logistics Market Competitive Benchmarking and Company Analysis

Leading companies in Pharmaceutical Third-Party Logistics industry include- DHL International GmbH, FedEx Corporation, United Parcel Service (UPS), Kuehne + Nagel International AG, Cencora, Inc. , SF Express, Agility Public Warehousing Co. K.S.C.P., McKesson Corporation, Cardinal Health, DSV. The Pharmaceutical Third-Party Logistics market remains moderately to highly fragmented, with competition expected to intensify as companies accelerate investments in innovation, geographic expansion, strategic partnerships, and portfolio diversification through 2034. In developed markets such as the United States, Germany, France, the United Kingdom, and Canada, competition is increasingly centered on innovation, reimbursement positioning, and value-based healthcare solutions. Meanwhile, emerging markets including China, India, Brazil, and countries across the Middle East and Africa continue to present significant opportunities for expansion due to rising healthcare expenditure, growing patient populations, and increasing access to healthcare services.

What to expect in US Pharmaceutical Third-Party Logistics Markets in 2026 and beyond- Market Size, Share, Growth Rate, and Forecast to 2034

The US healthcare expenditure is forecast to reach \$8.2 Trillion in 2034 from \$5.5 Trillion in 2026 based on the National Health Expenditure Accounts (NHEA) data. With an aging population, rising chronic disease burden, and increasing migration toward minimally invasive and outpatient care, the Pharmaceutical Third-Party Logistics market remains one of the strongest-performing segments in the country.

The US Pharmaceutical Third-Party Logistics Companies are opting new business models, optimized pricing models, industry partnerships, and AI-enabled back end transformations to enhance efficiency and cost management. The US Pharmaceutical Third-Party Logistics market faces successive waves of challenging trends, with strong opportunities across select segments. The CMS plan to implement Medicaid from 2027 is driving states to build eligibility verification systems throughout 2026. Looking ahead to 2034, we anticipate stronger results underpinned by opportunities exist across Pharmaceutical Third-Party Logistics industry. On the medical device front, over 7,000 device manufacturers continue to gain from increasing demand from demand for

implantable devices, surgical instruments, monitoring equipment, and diagnostic systems.

Canada- Proximity to the US and healthcare similarities to EU5 countries fuel sales of Canadian Pharmaceutical Third-Party Logistics markets

Canada's strong Pharmaceutical Third-Party Logistics sales performance is underpinned by an aging population and a well-developed healthcare infrastructure. Steady growth in new brand spending in rural and urban locations fuel the long-term prospects of small and medium-sized enterprises across medical, diagnostic, and therapeutic devices. The Canadian Pharmaceutical Third-Party Logistics market presents significant opportunities for U.S. exporters of medical devices, with the U.S. being Canada's largest trading partner for this sector. Potential advantages including specialized materials, advanced manufacturing techniques, and digital technologies support the launch of new products in the country.

Germany Pharmaceutical Third-Party Logistics Trends and Perspectives to 2034- Financial sustainability, hospital restructuring, demographic pressures, and digitization of care delivery continue to shape the German healthcare industry.

Germany continues to remain the largest Pharmaceutical Third-Party Logistics market in Europe, driven by over €600 Billion healthcare expenditure, €12 Billion medical device R&D expenditure, statutory health insurance system covering 90% German population, nationwide rollout of the electronic patient record (ePA), and large-volume of Pharmaceutical Third-Party Logistics population. In particular, Research and development in Germany fuels the commercialization of cutting-edge technologies. Companies across the Germany Pharmaceutical Third-Party Logistics industry value chain are focusing on both domestic markets and exports. The country is also driving digital adoption with the Hospital Future Act driving hospitals to upgrade their information systems by 2027. Over the forecast period, aging population, rising healthcare costs, and increasing procedural volumes drive the Pharmaceutical Third-Party Logistics market outlook.

France Market Size, Growth Rate, and Forecast Analysis to 2034- Universal healthcare system, high public healthcare expenditure, and strong government support Pharmaceutical Third-Party Logistics sales through 2034

France Pharmaceutical Third-Party Logistics companies are emphasizing on opportunities for rapid, at-scale innovation to boost profitability over the long-term. The

country's National Health Insurance spending target (ONDAM) estimates 3.7% growth in the country's healthcare expenditure. Over the forecast period, expenditure control measures, chronic disease management initiatives, workforce reforms, and efforts to improve system efficiency drive the long-term prospects.

The biggest 2026 policy frame is the PLFSS 2026. The law sets the Maladie branch spending target at €271.4 billion for 2026 and fixes the ONDAM at €117.5 billion for city care, €112.8 billion for health establishments, and €18.3 billion for elderly-care establishments and services. France's market is also being pulled by demographics. INSEE estimates that on 1 January 2026 France had 69.1 million inhabitants, with 22% aged 65 or over. INSEE also reported that 2025 births were 645,000 and deaths were 651,000, producing a negative natural balance of about 6,000 for the first time since the end of the Second World War.

UK Pharmaceutical Third-Party Logistics Market Size, Share, and Growth Projections to 2034- Rapid growth driven by new and existing brands across the industry value chain

Small high-need consumer segments remain key priority of Pharmaceutical Third-Party Logistics distributors in the UK industry. Continuous launch of new products coupled with high expenditures support the market outlook. The UK Government financing remains the dominant funding source at 81.3% of total healthcare expenditure, or ?280 billion in 2025. According to the ONS, total healthcare spending grew 7.7% nominally and 3.9% in real terms from 2024 to 2025. Similarly, out-of-pocket spending was ?49 billion (14.1%) and voluntary health insurance was ?9.5 billion (2.8%). The market is driven by rapid digital adoption with NHS England's plan to give more than 500,000 staff access to new AI tools.

China Pharmaceutical Third-Party Logistics Market Growth Drivers, Revenue Trends, and Forecast- Medical insurance coverage is rapidly expanding over the past few years

China Pharmaceutical Third-Party Logistics market is undergoing a structural shift from hospital-centric care toward a more integrated system emphasizing primary care, outpatient services, and long-term care. Chinese local players are emerging as a strong pillar of Pharmaceutical Third-Party Logistics industry, offering opportunities for both competition and partnership. Over the forecast period, new and innovative product launches remain key elements driving market outlook. China's healthcare industry is increasingly centered on expanding healthcare capacity, improving access to advanced treatments, and reducing dependence on imported technologies.

The National Healthcare Security Administration reported that by end-2024, China's basic medical insurance covered 1.32662 billion people and the coverage rate was 95%. Regional disparities in consumer spending trends continue to become more pronounced in the Chinese Pharmaceutical Third-Party Logistics industry. Over the forecast period, demand will keep shifting toward geriatrics, chronic disease management, rehabilitation, long-term care, and outpatient care, while pricing pressure will remain intense in drugs and consumables because reimbursement.

India Pharmaceutical Third-Party Logistics Market Landscape: Current Size and Long-Term Growth Outlook - Increased pricing pressures in US market is encouraging domestic vendors to expand across India

Indian Pharmaceutical Third-Party Logistics market is witnessing the rapid emergence of an ecosystem that brings together diverse companies across the industry value chain. Further, large-scale healthcare public and private investments and a steady growth in chronic conditions is driving sales of pharmaceuticals and medical devices. Further, non-retail channel is experiencing volume decrease and patients are migrating to the retail. Indian medical device firms are also combining precision engineering with lower labor costs to make world-class diagnostics, robotics, and critical care devices.

Brazil Pharmaceutical Third-Party Logistics market remains price-driven, with products domestically manufactured and accessibility offering potential opportunities

Healthcare expenditure in Brazil exceeds 10% of GDP, with the country among the highest healthcare spenders in Latin America. ANS reported 53.2 million medical-plan beneficiaries in December 2025, while IBGE projects a steady rise in older-age cohorts, with people aged 60+ already representing about 23% of the population. The price sensitive market access is broad through the public system, private coverage adds a sizeable premium layer, and reimbursement, procurement, and hospital efficiency remain key buying drivers.

Middle East and Africa Pharmaceutical Third-Party Logistics Industry Trends and Perspectives to 2034

According to the World Bank, the Middle East and North Africa population exceeds 500 million, while Sub-Saharan Africa's population exceeds 1.2 billion, making the broader MEA region one of the fastest-growing healthcare demand centers globally. The GCC countries including Saudi Arabia, United Arab Emirates, Qatar, and Kuwait continue to account for a disproportionately large share of regional healthcare spending.

Government-led programs such as Saudi Arabia's Vision 2030 are accelerating investments in hospital infrastructure, private-sector participation, medical technology adoption, and healthcare digitalization. On the other hand, South Africa, Egypt, Nigeria, and Kenya remain key healthcare markets due to their large populations, expanding private healthcare sectors, and growing investments in healthcare delivery systems.

Pharmaceutical Third-Party Logistics Market Segmentation

By Service Type

Transportation

Value-Added Warehousing and Distribution

Specialized and Secondary Services

By Temperature Control

Ambient / Non-Cold Chain

Cold Chain

By Product Type

Prescription / Branded Drugs

Generic Drugs

Biopharmaceuticals, Biosimilars, and Vaccines

Cell and Gene Therapies

Other Products

By End User

Pharmaceutical and Biotech Manufacturers

Hospitals, Pharmacies, and E-Commerce Channels

Clinical Trial and Research Sponsors

Leading Companies in Pharmaceutical Third-Party Logistics Industry (2026)

DHL International GmbH

FedEx Corporation

United Parcel Service (UPS)

Kuehne + Nagel International AG

Cencora, Inc.

SF Express

Agility Public Warehousing Co. K.S.C.P.

McKesson Corporation

Cardinal Health

DSV

Countries Included

North America- US, Canada, Mexico

Europe- Germany, France, UK, Spain, Italy, Nordics, Others

Asia Pacific- China, India, Japan, South Korea, Australia, Southeast Asia,
Others

Latin America- Brazil, Argentina, Others

Middle East and Africa- Saudi Arabia, UAE, Other Middle East, South Africa,
Other Africa

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By Product Type

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Biopharmaceuticals, Biosimilars, and Vaccines

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Agility Public Warehousing Co. K.S.C.P.

McKesson Corporation

Cardinal Health

DSV

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