Delivering through Uncertainty:

Big and Bulky Last-Mile Delivery in the United States – 2025

June 2025

National Home Delivery Association
Advancing Delivery & Set-Up of Bulky Goods

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About The National Home Delivery Association (NHDA)

In 2013 ten of the leading home delivery companies specializing in the "white glove" delivery of appliances, furniture and large electronics to homes came together to address common interests. These ten firms founded the National Home Delivery Association with a shared commitment to enhancing the industry through training, setting standards for customer service and enhancing the profile of this vital segment of America's retail economy. The NHDA has grown to over 70 member companies representing the leading companies in this segment of the logistics industry. Collectively, NHDA members account for over 70% of residential "bulky goods" deliveries and setups, utilizing thousands of delivery teams and logistics professionals across the country.

The National Home Delivery Association (NHDA) is committed to advancing the interests of individuals, companies, and organizations that deliver furniture, appliances, and electronics to the home by promoting the highest standards of professionalism and customer service.

About Armstrong & Associates, Inc. (A&A)

Armstrong & Associates, Inc. (A&A), founded in 1980, is a leader in Third-Party Logistics (3PL) market research, consulting, and M&A advisory services. A&A has become an internationally recognized key resource for information and consulting in the 3PL market.

A&A's mission is to possess leading proprietary knowledge in supply chain management and market research that is not available anywhere else. Our ongoing commitment to this mission is demonstrated by the frequent citations of A&A's 3PL market research in media articles, publications, and the securities filings of publicly traded 3PL companies. Additionally, A&A's email newsletter currently has over 88,000 subscribers worldwide.

A&A's market research enhances its consulting services by providing continuously updated data for analysis. Leveraging its extensive knowledge of the third-party logistics (3PL) market and the operations of top 3PL providers, A&A has delivered strategic planning consulting to more than 50 3PL companies. Additionally, it has supported 26 completed investment transactions and offered advice to numerous organizations seeking to benchmark their current 3PL operations or outsource logistics functions.

Introduction

The National Home Delivery Association (NHDA) and Armstrong & Associates, Inc. (A&A) partnered for this study covering the Third-Party Logistics (3PL) Big and Bulky U.S. Last-Mile Delivery Market to identify current market size, historical growth and outlook, key providers, customers and verticals served, e-commerce's role, and other trends. For the study, we utilized two separate surveys and public information. The surveys were sent to NHDA members and other U.S. last-mile delivery third-party logistics providers (3PLs). 2024 last-mile delivery revenues of the 3PLs analyzed range from $1.5 million to $1.1 billion, representing 32% of the estimated $10.15 billion U.S. Third-Party Logistics Big and Bulky Last-Mile Delivery Market.

Big and Bulky Market Segment Defined

In this report, last-mile delivery is defined as the transportation of big and bulky shipments (not parcels) from the last warehouse or terminal to the final consignee for commodities such as furniture/mattresses, appliances, electronics/high-tech, exercise equipment, construction materials, industrial machinery, or medical equipment to a destination within the United States where they will be used or consumed. These can be business-to-business (B2B) or business-to-consumer (B2C) shipments.

Market Overview

The Big & Bulky Last-Mile Delivery market has quickly become one of the most dynamic and demanding segments within logistics and e-commerce. It focuses on transporting oversized, heavyweight items — such as furniture, home appliances, exercise equipment, and large electronics — that fall outside the scope of standard parcel networks. As more consumers purchase these cumbersome products online, 3PLs face growing pressure to provide not just transportation, but a premium, in-home delivery experience that may include setup, installation, and even haul-away services.

Last-mile e-commerce orders are typically shipped as small packages and transported by parcel carriers. Third-party logistics providers with fleets of independent contractors and freight brokerage operations deliver many last-mile orders. In addition, Less-than-Truckload (LTL), Last-Mile, Household Goods, and Truckload (TL) carriers are expanding last-mile services for big and bulky items to accommodate the rapid growth in e-commerce retail sales.

Although the last mile represents the shortest leg of the delivery journey, it is often the most operationally complex and cost-intensive. Transportation from a distribution or fulfillment center to the customer's doorstep can account for 30% to 40% of total transportation costs. Revenue per shipment in this segment typically falls below traditional LTL averages, with less than $90 per shipment being common. However, total revenue varies significantly based on service level. High-touch deliveries, such as full-room setup with installation, can generate up to $250 per shipment, while basic curbside or threshold deliveries may yield as little as $50.

Delivering big and bulky goods presents distinct logistical challenges requiring specialized solutions. These items typically require two-person delivery teams, specialized equipment such as lift gates, dollies, or ramps, and longer delivery times at each stop, contributing to significantly higher operational costs. Additional complexities arise from issues such as missed delivery windows, item damage, and access constraints, including narrow staircases or multi-story buildings, further complicating the delivery process.

This has placed pressure on profitability, which parcel carriers address by increasing prices, improving efficiencies, expanding networks, and investing in sortation capacity.

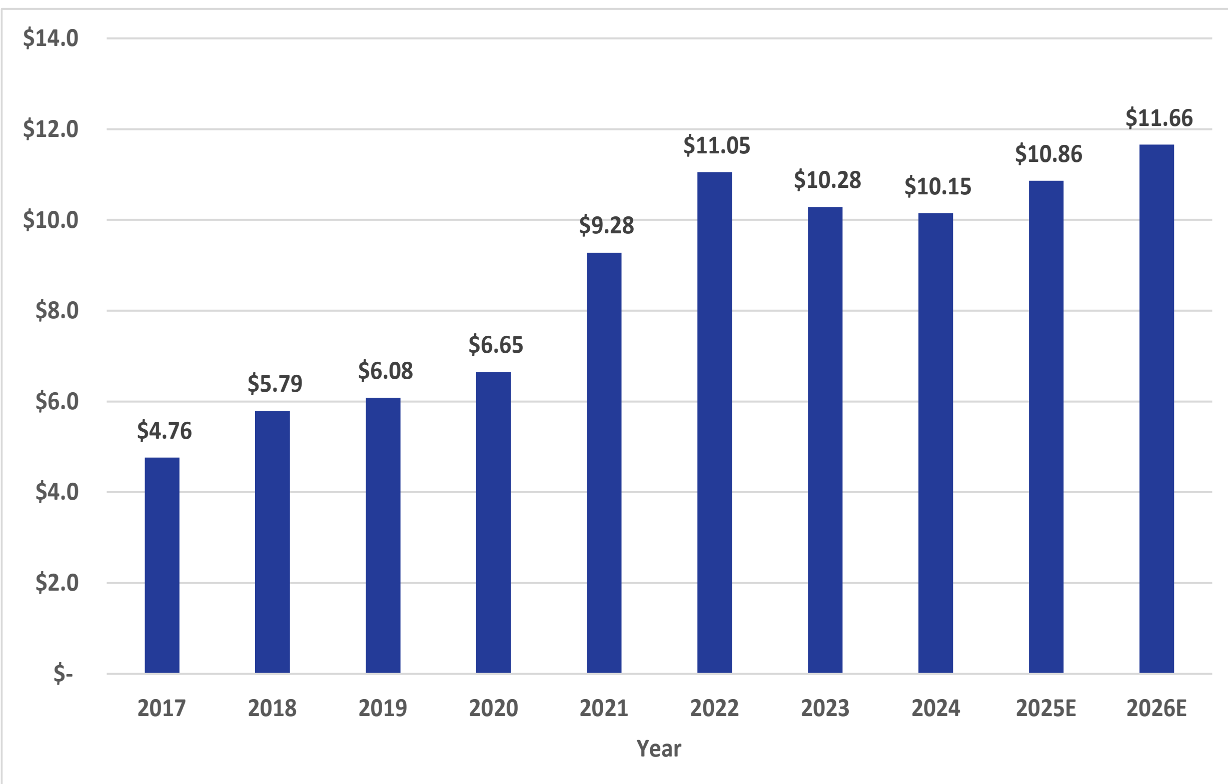
However, last-mile pressures continue to mount with e-commerce customer delivery demands.

Many 3PLs are turning to advanced technologies to address these challenges. Adopting intelligent routing software, dynamic scheduling systems, and real-time tracking platforms enables companies to enhance operational efficiency, mitigate potential delays, and improve the overall customer experience.

From our market research results and A&A analysis, we estimate the U.S. 3PL Big and Bulky Last-Mile Delivery Market experienced a compound annual growth rate (CAGR) of 11.4% from 2017 through 2024 and estimate it will have a CAGR of 7.2% from 2024 through 2026. The expansion is primarily driven by major retailers and e-commerce platforms like Amazon, Wayfair, and Home Depot, all of which have made large-format products central to their online offerings. As customer expectations evolve toward faster, more transparent, and seamless delivery experiences, businesses are being pushed to scale operationally without compromising quality or cost control.

There is considerable uncertainty regarding the newly imposed import tariff levels. However, we believe that a decrease in consumer spending will have the most significant impact on big and bulky last-mile delivery 3PLs. Since the demand for last-mile delivery is closely tied to consumer behavior, we see this as a major challenge. This scenario also contributes to our lower growth projections for the period from 2024 to 2026.

Figure 1. U.S. 3PL Big and Bulky Last-Mile Delivery Market (Gross Revenue in US$ Billions) from 2017 - 2026E



U.S. 3PL Big and Bulky Last-Mile Delivery gross margins were 28.9% in 2022, 28.1% in 2023, and 27.9% in 2024.

Market Growth Drivers and Trends Outlook

The last-mile delivery 3PL segment for big and bulky items has been undergoing significant changes driven by market, technological, and economic factors. Key trends include:

- **Import Tariff Impacts and Economic Uncertainty:** Due to import tariffs and uncertain economic conditions, consumers have reduced their spending, leading to a decline in retail sales volume. Retailers expect lower profit margins to minimize the impact of import tariff costs on consumers. However, 3PL customer demand for costly, fast, second, and same-day delivery, along with real-time order tracking, remains strong.

- **3PL Consolidation and Independent Contractor Laws:** 3PLs are continuing to be consolidated through mergers and acquisitions, and evolving independent contractor laws are challenging logistics operations.

- **Service Excellence and Customer Expectations:** Despite the challenges in last-mile delivery, 3PL growth is possible through outstanding service performance. Customers increasingly demand faster, more reliable delivery, real-time shipment tracking, and order visibility. This trend is driving technological innovation and automation to strengthen core operations.

- **Precision Delivery Planning and Execution:** Timely, predictable deliveries are essential for customer satisfaction and operational efficiency. They reduce disruptions and minimize costs, such as redelivery attempts.

- **Forward Stocking Locations (FSLs):** Strategically positioning inventory closer to end customers through smaller, decentralized forward stocking locations enhances on-time service and delivery consistency. By utilizing FSLs, companies can shorten delivery times, provide more reliable same-day or next-day service, and reduce customer shipping costs.

- **Returns Management:** The returns process for big and bulky items is more complex. Some third-party logistics providers are focusing on streamlining the reverse logistics process to support easy returns of these items and ensure a hassle-free experience.

- **Artificial Intelligence and Automation**: AI and automation are transforming last-mile delivery by optimizing routes, predicting delivery times, and enhancing overall efficiency.

- **Sustainability:** Some 3PLs are implementing eco-friendly solutions, such as electric vehicles, optimized routes, and sustainable packaging, to reduce their carbon footprints.

According to data from the U.S. Census Bureau, overall U.S. trade increased by 4.6% in 2024, reaching $5.3 trillion. This marks a 0.5% increase over the second-highest total recorded in 2022. U.S. trade partnerships have shifted due to a rise in nearshoring efforts. Mexico emerged as the U.S.'s top trading partner for the second consecutive year, and as a result of Mexico's strong trade performance, Port Laredo finished as the top port for the second year in a row. Canada and China continued to be significant trading partners in 2024.

Primary aviation, including jets and fuselage parts, was the top export for the first time since 2021. The next top exports included oil, refined petroleum, natural gas, and passenger vehicles.

The top imports were passenger vehicles for the second consecutive year. Oil ranked second, followed by cell phones, parts, computers.

Overall, durable goods finished the year with a decrease of 1.5% to $3.4 trillion. Shipments were up 1.8% to $3.4 trillion.

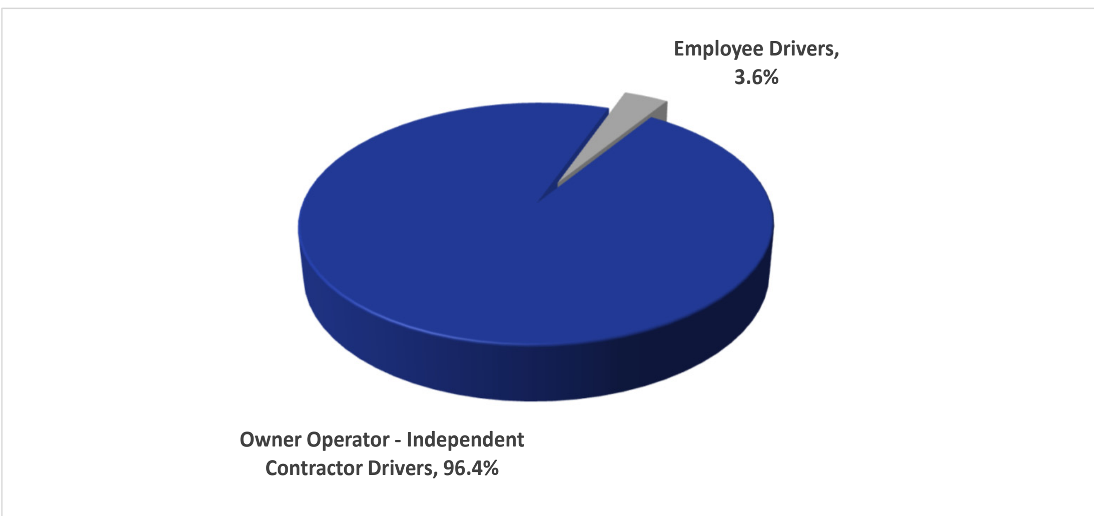
The Bureau reported that in 2024, shipments and new orders (not seasonally adjusted) for typical big and bulky goods handled via last-mile delivery remained slow compared to previous years. Shipments of computers and related products grew by 1.2%, while new orders increased by 2.8% compared to 2023. Additionally, shipments and new orders for electrical equipment, appliances, and components rose by 2.1%.

On April 2, 2025, the U.S. Census Bureau reported that new orders for manufactured durable goods in February increased in the last three months, climbing to $594.0 billion. Shipments of manufactured durable goods were up for four consecutive months to $596.8 billion.

Employment Trends and Use of Independent Contractor Trucking Capacity

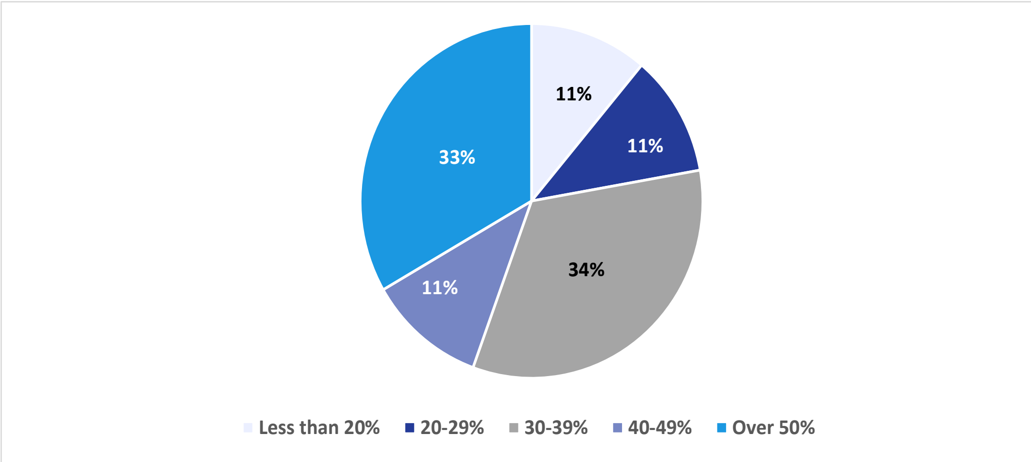
Our market research indicates a notable rise in the use of owner-operators and independent contractors in last-mile third-party logistics (3PL) operations from 2021 to 2024. As of 2024, they make up 96.4% of the driver workforce in last-mile delivery operations, up from 92.6% in 2023. In contrast, employee drivers account for only 3.6% of the total.

Figure 2. Owner Operator / Independent Contractor Drivers as a % of Total



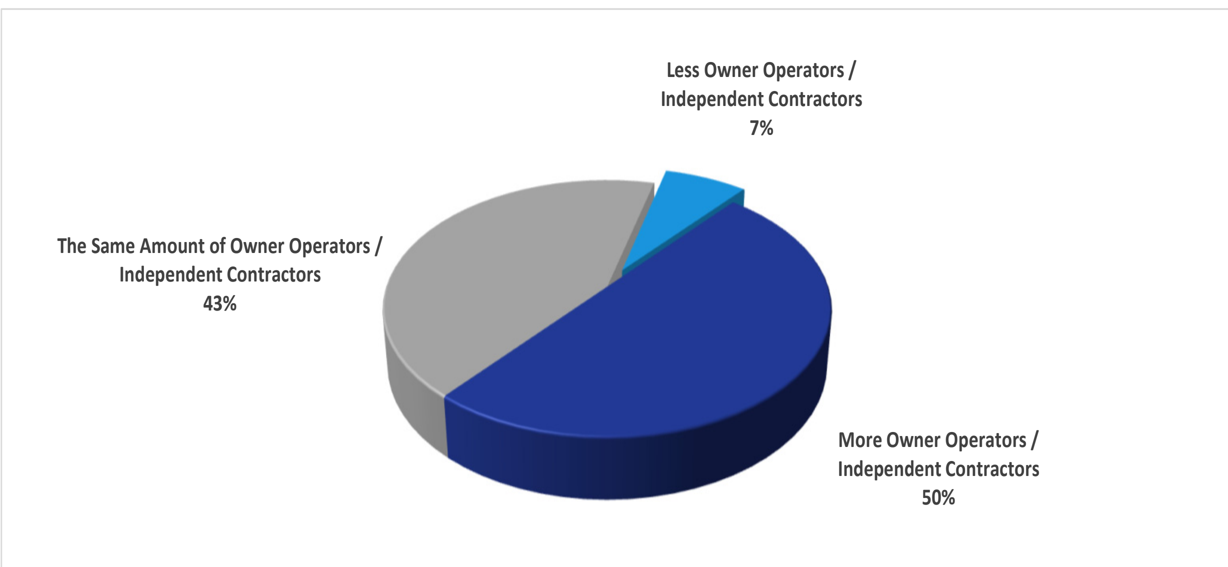
Independent contractor turnover remains a significant challenge. When asked about the percentage of independent contractors who turned over in 2024, eleven percent of respondents reported that less than 20% had turned over. Meanwhile, forty-four percent reported a turnover rate exceeding 40%.

Figure 3. Independent Contractor Turnover in 2024



The use of owner-operator/independent contractor drivers is expected to persist as the predominant choice in the industry. According to the survey, 50% of respondents plan to increase their use of these drivers over the next three years, a decrease from 80% in the 2023 survey. Additionally, 43% of respondents intend to maintain the same usage level as last year. Only 7% of third-party logistics providers (3PLs) indicated they plan to reduce their reliance on owner-operator/independent contractor drivers.

Figure 4. Use of Owner Operator / Independent Contractor Drivers over the next 2-3 Years



According to our survey results, the average cost to onboard an independent contractor is approximately $4,000 and ranges from $1,500 to $7,000 per route.

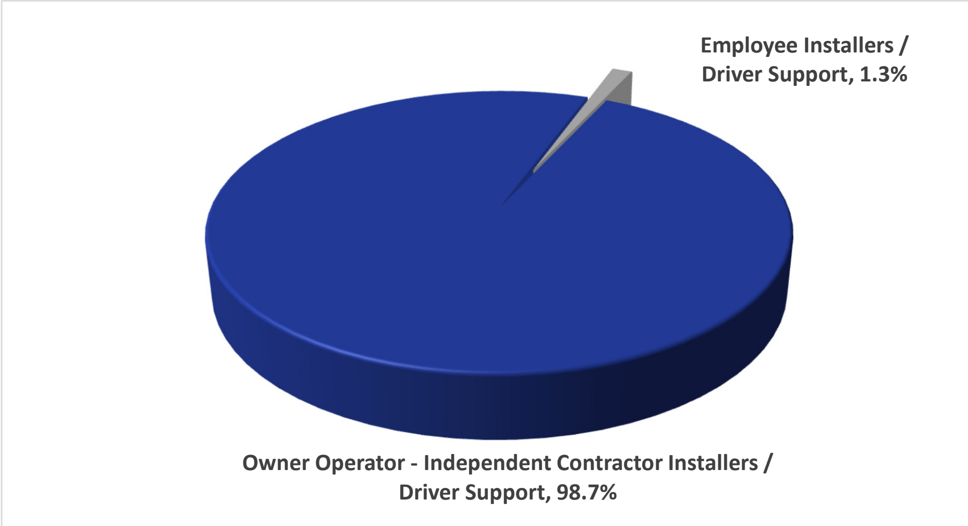
Using owner-operator/independent contractor drivers instead of employee drivers offers many advantages. However, as the table below illustrates, each driver type has benefits and drawbacks.

Table 1. Owner Operator / Independent Contractor Drivers versus Employee Drivers

Owner Operator / Independent Contractor Drivers			Employee Drivers	
Advantages	**Disadvantages**		**Advantages**	**Disadvantages**
It allows the company to be "asset-light" or operate without owning any of the equipment (trucks and trailers).	Providers have less control over how drivers carryout pickup and delivery operations.		Employee drivers are required to perform tasks as assigned and, therefore, can be easier to manage.	Providers are required to withhold taxes, provide workers' compensation benefits, and pay Social Security, Medicare, or any other insurance.
It allows the drivers to build their own business, make decisions, and ultimately control their own business.	Drivers are free to reject dispatched shipments and individually manage routes without oversight.		Providers have more control over dispatch, routings, and process engineering/optimization.	Employees don't typically have the same flexibility as independent contractors, but are paid a set hourly wage and receive benefits.
Independent contractors are typically paid based on work performed (such as miles, stops in transit, and value-added services) rather than on an hourly basis. Since the contractor is financially responsible, this can increase productivity, reduce claims, and increase safer driving.	Many independent contractors are entrepreneurial and enjoy the flexibility to manage their business as they choose. Some have other subcontractors working for them.		Being an employee driver provides steady income and benefits.	Employee drivers are often managed in a "top-down" fashion and have little control over their workday. Productivity is typically lower than independent contractors and workers' compensation claims are generally higher.
As the contractor is the financially responsible party, it's less burdensome to the 3PL since there's no requirement for it to withhold taxes, provide workers' compensation benefits, or pay Social Security, Medicare, or any other insurance or benefits.	When last-mile demand is strong, independent contractors can do very well; it can be harder economically in times of "soft" demand.		When last-mile demand gradually rises and falls, an employee driver won't be affected significantly in terms of pay.	If last-mile demand decreases too sharply, employee drivers can be subject to layoffs.

When providing additional labor to support drivers and perform installations, such as setting up furniture or installing appliances upon delivery, 98.7% of this work is handled by owner-operators/independent contractors, while employees constitute only 1.3% of the workforce.

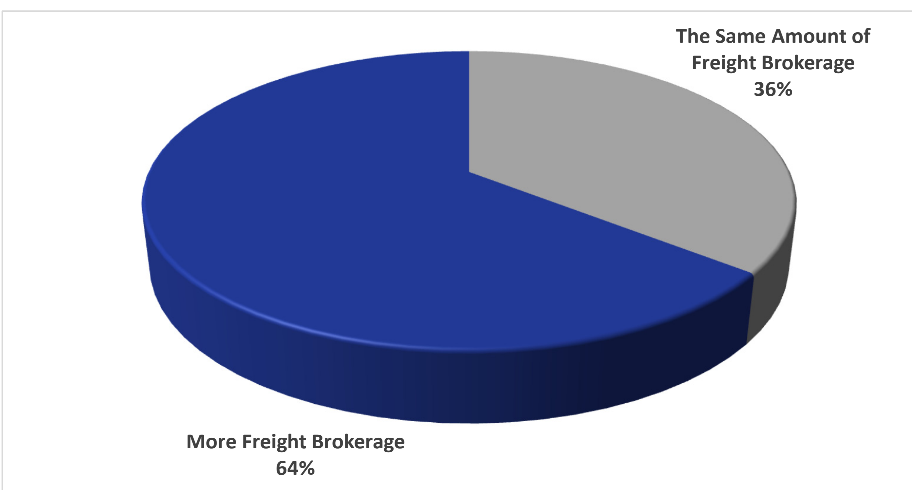
Figure 5. Driver Support / Installer Labor Type as a Percent of Total



The shortage of independent contractors and the decline in new entrants contribute to tight last-mile carrier capacity and an increased use of freight brokerage. Eighty percent of our survey respondents have freight brokerage operations, which are leveraged as another means to secure last-mile delivery carrier capacity. This figure has increased compared to the 2021 and 2023 surveys. In 2021, 12% of the survey respondents planned to use less freight brokerage. Respondents in the last two surveys said they plan to continue brokering loads to last-mile carriers. In 2024, 64% of all 3PLs expect to increase the amount of freight brokerage they perform.

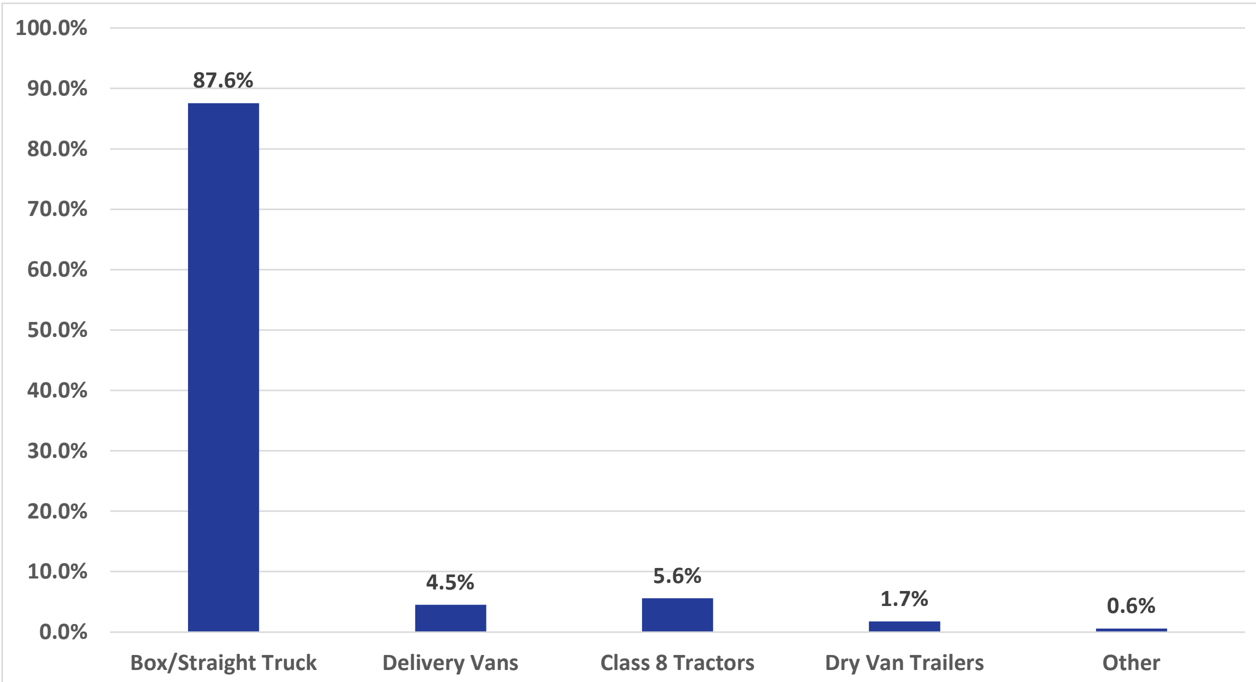
California's Assembly Bill 5 (AB5) reclassifies many independent contractors as employees if specific conditions are unmet. Similar legislation drives Big and Bulky Last-Mile 3PLs to increasingly rely on freight brokerage to secure carrier capacity.

Figure 6. Use of Freight Brokerage over the next 2-3 Years



The equipment used in big and bulky last-mile delivery is typically leased, with Box/Straight Trucks dominating most fleets. From 2023 to 2024, Box/Straight Trucks increased from 77.3% to 87.6% of the total equipment by equipment type. Delivery Vans, Class 8 Tractors, and Dry Van Trailers comprised less of the total equipment breakdown in 2024.

Figure 7. Percent of Total Equipment by Equipment Type



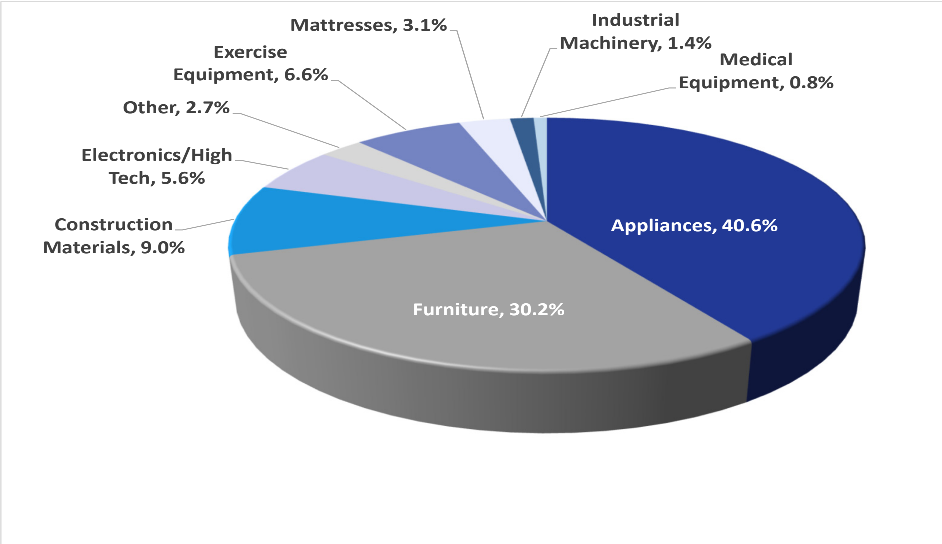
White glove delivery is a typical service most of our big and bulky 3PL survey respondents provide. It provides a full suite of premium services, including but not limited to inside delivery, over the threshold, room of choice, stair carry, assembly or installation, and removal and disposal of packaging.

When asked what unique services and specializations our survey respondents are providing, they mentioned complex installation of appliances that require licensing, reverse logistics, end-to-end capacity, relay-loaded delivery trucks reducing client warehousing needs, recycled dunnage, and technology that enables customers to select specific delivery windows.

Customer Trends and Revenue by Vertical Industry

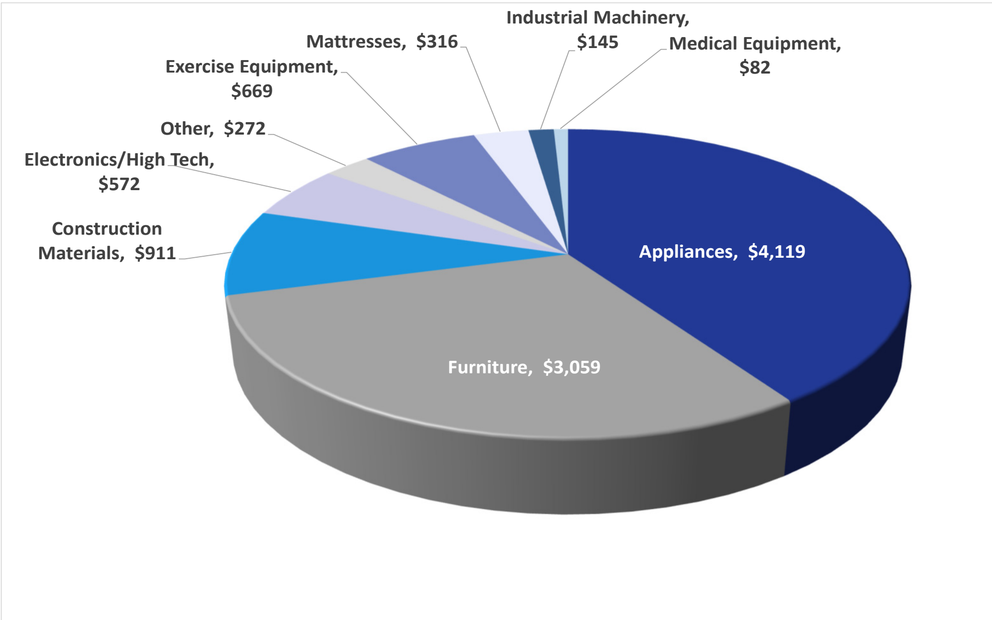
Appliances account for 40.6% of the total number of big and bulky last-mile deliveries. Furniture accounts for 30.2%, which together dominated over two-thirds of the big and bulky last-mile deliveries made by our 3PL survey participants in 2024. Construction Materials and Exercise Equipment were the next most delivered commodities at 9.0% and 6.6%. These four commodities combined accounted for over 86% of big and bulky last-mile deliveries in the U.S. in 2024. The remaining 14% of big and bulky deliveries comprised Electronics/High Tech, Mattresses, Industrial Machinery, Medical Equipment, and other commodities.

Figure 8. 3PL Big and Bulky Last-Mile Deliveries by Commodity / Industry – 2024



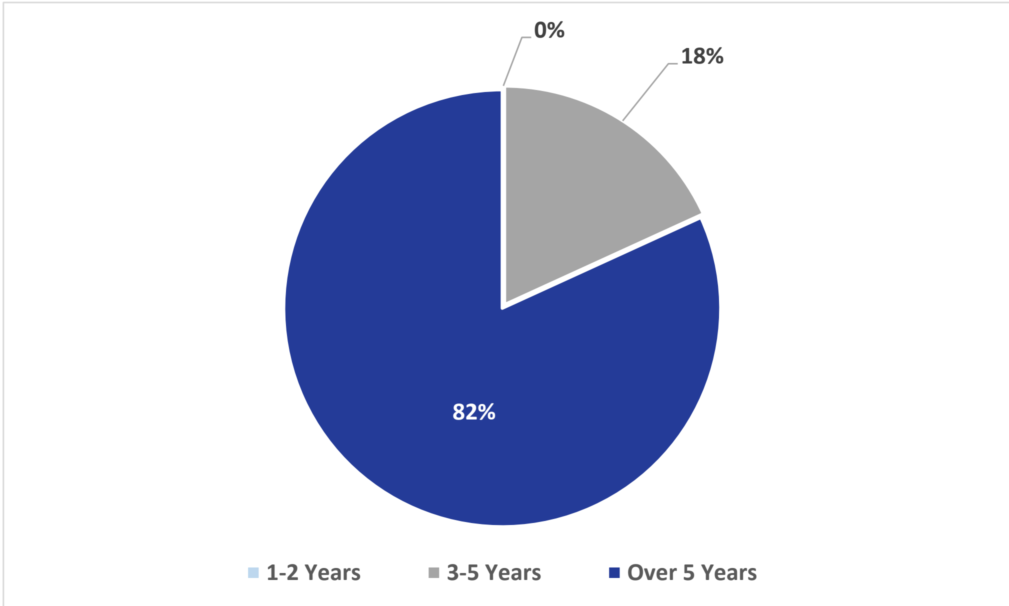
Using the delivery data as a proxy, we can estimate the 2024 3PL gross revenue by commodity/industry, shown in the figure below. Furniture, Mattresses, Electronics/High Tech, Medical Equipment, and other commodities have all come down compared to the 2023 gross revenues. Construction Materials are fairly flat year over year. Appliances, Exercise Equipment, and Industrial Machinery have increased compared to 2023.

Figure 9. 3PL Big and Bulky Last-Mile Gross Revenue by Commodity / Industry ($US Millions) – 2024



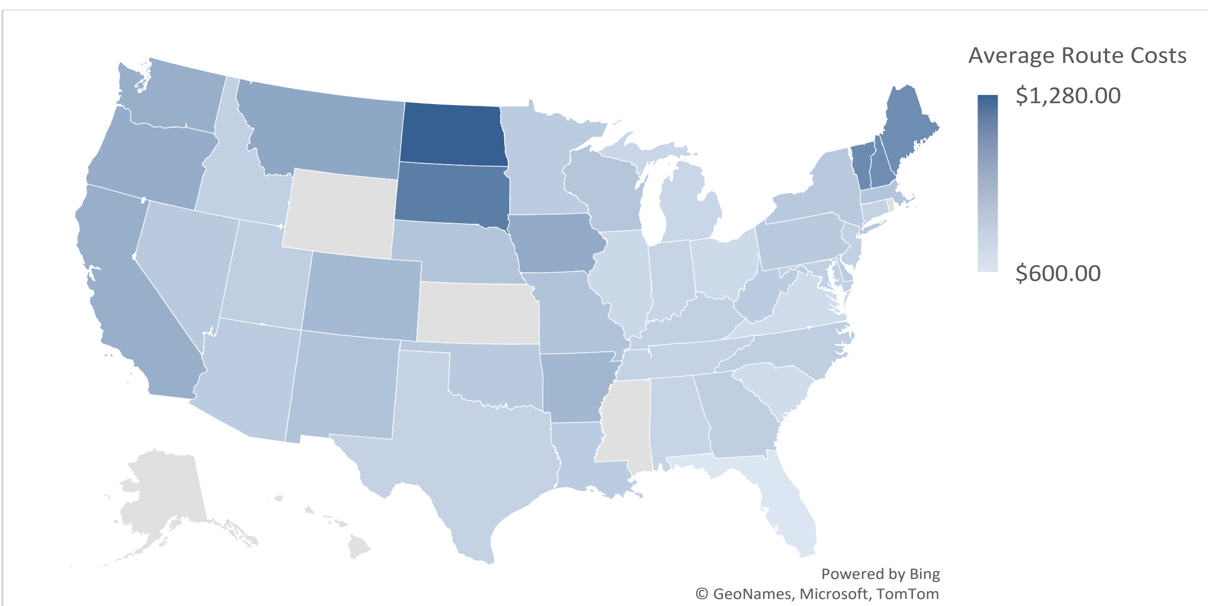
Eighty-two percent of survey respondents reported that their average shipper relationships lasted more than five years. Eighteen percent stated the average duration was between three and five years. Notably, none of the third-party logistics providers indicated having worked with a shipper for less than two years in the 2024 analysis. The complexity of big and bulky deliveries requires a level of trust, which contributes to stronger and more loyal shipper relationships.

Figure 10. Average Length of Shipper Relationships



We gathered information from 3PL respondents regarding route costs and the average number of stops for last-mile deliveries. Based on their feedback, we developed last-mile delivery route cost estimates for 44 states and geographical areas listed below.

Figure 11. Average Last-Mile Delivery Route Costs by State



North Dakota had the highest average route costs, totaling $1,280, followed by South Dakota at $1,130. In contrast, Northern Florida recorded the lowest average route cost at $600, with South Carolina and Virginia close behind at $650. In terms of stops per route, Maryland led with an average of 16 stops, followed by Idaho, Minnesota, Nevada, and New York with 14 stops. On the other end of the spectrum, Maine and New Hampshire had the fewest average stops per route, averaging just 6 stops.

Table 2. Average Route Costs and Stops Per Route by State

State	Average Route Costs	Average Stops per Route
Alabama	$690.00	11
Arizona	$730.00	11
Arkansas	$840.00	8
California (North)	$880.00	13
California (South)	$850.00	13
Colorado	$830.00	11
Connecticut	$700.00	12
Delaware	$730.00	13
Florida (Northern)	$600.00	9
Florida (Southern)	$700.00	11
Georgia	$720.00	12
Idaho	$710.00	14
Illinois	$670.00	12
Indiana	$690.00	12
Iowa	$900.00	11
Kentucky	$710.00	11
Louisiana	$730.00	10
Maine	$1,050.00	6
Maryland	$710.00	16
Massachusetts	$770.00	13
Michigan	$680.00	13
Minnesota	$730.00	14
Missouri	$780.00	12

Table 2. Average Route Costs and Stops Per Route by State - Continued

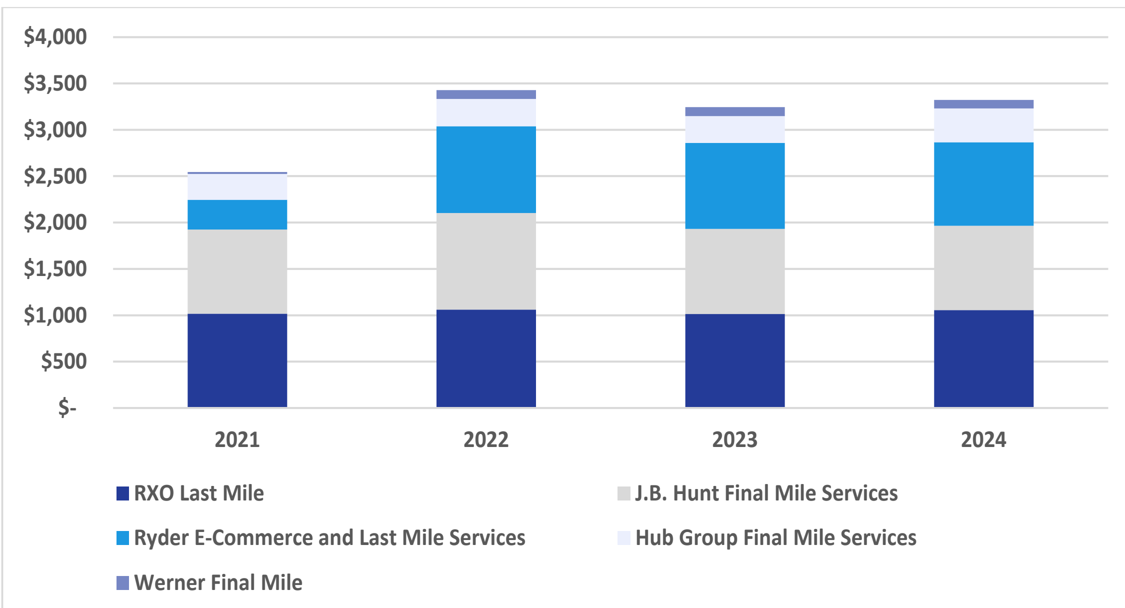
State	Average Route Costs	Average Stops per Route
Montana	$920.00	9
Nebraska	$770.00	12
Nevada	$740.00	14
New Hampshire	$1,050.00	6
New Jersey	$710.00	13
New Mexico	$780.00	11
New York	$750.00	14
North Carolina	$720.00	12
North Dakota	$1,280.00	12
Ohio	$660.00	12
Oklahoma	$740.00	10
Oregon	$890.00	13
Pennsylvania	$740.00	11
South Carolina	$650.00	11
South Dakota	$1,130.00	7
Tennessee	$700.00	11
Texas	$700.00	13
Utah	$720.00	13
Vermont	$1,060.00	7
Virginia	$650.00	10
Washington	$880.00	12
West Virginia	$730.00	8
Wisconsin	$760.00	12

The Competitive Last-Mile Delivery Landscape

In the United States, the Big and Bulky Last-Mile Delivery Market is dominated by both established logistics providers and innovative, technology-driven companies. Major players such as RXO, Ryder, and J.B. Hunt operate on a national scale, offering a range of service levels from basic threshold delivery to comprehensive white-glove services. Emerging companies like Deliveright and Frayt leverage agility, sustainability, and digital-first solutions to disrupt the market. In addition, regional carriers are gaining market share by delivering highly personalized services and offering faster response times in localized areas.

Among the publicly traded members of the NHDA that have published last-mile revenue figures, we compared gross revenue performance from 2021 to 2024. RXO Last Mile reported gross revenues of $1,055 million for the year, representing a 4% increase compared to 2023. J.B. Hunt Final Mile Services reported $910 million, which is a decline of 0.9% from 2023. Ryder E-Commerce and Last Mile Services had an estimated $901 million in revenue, down 2.7% from 2023. Hub Group acquired Forward Air Final Mile and reported an estimated $365 million in last-mile revenues, reflecting a significant increase of 26.3% compared to 2023. Werner, which began reporting last-mile revenues in late 2021, finished 2024 with $91 million, down 7% from 2023.[1]

Figure 12. Select 3PL Last-Mile Delivery Gross Revenues – 2021-2024 (US$ Millions)



Between 2013 and 2015, XPO Logistics, now known as RXO, positioned itself as the leading last-mile delivery 3PL through four strategic acquisitions: 3PD, Optima Service Solutions, Atlantic Central Logistics, and UX Specialized Logistics. Although RXO continues to lead the market, its last-mile delivery revenue has experienced a compound annual growth rate (CAGR) of -0.2% from 2018 to 2024. The acquisition of Coyote in 2024 further expands RXO's customer base, broadens its carrier network, and enhances its technology, solidifying its market position.

1 A&A estimates are based on figures in company annual reports and investor-related materials.

J.B. Hunt experienced a compound annual growth rate (CAGR) of 15.9% from 2018 to 2024, driven by several acquisitions aimed at enhancing its last-mile delivery capabilities. In 2017, the company acquired Special Logistics Dedicated. This was followed by the acquisition of Cory 1st Choice Home Delivery and the assets of RDI Last Mile in 2019. In 2020, J.B. Hunt took over the assets of Mass Movement, and in 2022, it acquired the assets of Zenith Freight Lines. Most recently, in September 2023, J.B. Hunt announced its acquisition of the brokerage operations of BNSF Logistics, which is affiliated with BNSF Railway Company. BNSF Logistics offers a range of services, including full truckload, less-than-truckload, drayage, and expedited services; however, the transaction did not include its warehousing, heavy haul, and project services operations. Additionally, in early 2024, J.B. Hunt revealed a multi-year intermodal service agreement with Walmart, further solidifying its relationship with this important customer.

Ryder has expanded its last-mile segment through strategic acquisitions. In 2018, it acquired MXD Group. In 2022, Ryder acquired Whiplash, which tripled its last-mile revenues and brought it close to J.B. Hunt in annual performance. In 2023, Ryder announced plans to acquire the remaining equity in Impact Fulfillment Services (IFS), a company that specializes in contract packaging, contract manufacturing, and warehousing for large customers in consumer packaging, retail, and healthcare. In 2024, Ryder also acquired Cardinal Logistics. As a result, Ryder and J.B. Hunt are in a competitive race for second and third place in the market. From 2018 to 2024, Ryder's last-mile revenues experienced a compound annual growth rate (CAGR) of 32.3%.

In December 2023, Forward Air's Final Mile business became part of **Hub Group**, an acquisition valued at $262 million. Hub Group with Forward Air's Final Mile generated $365 in revenues in 2024.

A smaller competitor, **Werner Logistics**, had $91 million in final-mile revenues in 2024, down 7% compared to 2023.

When asked about their plans to expand last-mile delivery options or networks, nearly all 3PLs responded affirmatively, indicating intentions for growth through both organic development and acquisitions. Many 3PLs, including members of the NHDA, have also expanded their last-mile delivery operations through acquisitions.

Table 3. Additional 3PL Last-Mile Delivery M&A Trends in 2024

Ryder Ever better.	In February, Ryder completed the acquisition of Cardinal Logistics, strengthening its position as a customized dedicated contract carrier leader. Cardinal provides dedicated fleets and drivers across distribution centers, suppliers, and stores. It also offers freight brokerage services, last-mile delivery, and value-added warehousing and distribution services.
ADL FINAL MILE	RD Last Mile Holdings (ADL Final Mile) acquired Sonic Systems' assets (Sonic Transportation & Logistics) in February. Sonic provides customized and final-mile logistics services in Florida. ADL is headquartered in Omaha, NE, and its regional footprint covers 17 states. Acquiring Sonic benefits ADL's existing infrastructure in Florida and allows them to service customers more efficiently.
RXO	In June, RXO announced the $1.025 billion agreement to purchase Coyote Logistics from UPS, making it North America's third-largest provider of brokered transportation. The acquisition closed in September. RXO expects to leverage Coyote's established customer base and carrier relationships to provide more capacity to its customers and increase freight access to its carriers.
ConnectM	In August, ConnectM, a clean energy technology and solutions provider for residential and light commercial buildings, paid $5.2 million to acquire a controlling interest in DeliveryCircle. DeliveryCircle is a nationwide, technology-enabled, final-mile delivery company that connects businesses to a network of over 500,000 drivers. ConnectM will leverage DeliveryCircle's technology and its extensive network of independent contractors to optimize routes and dispatch operations throughout the U.S.
SpeedX	In November, SpeedX, a tech-enabled last-mile delivery provider, announced the acquisition of Accelerated Global Solutions (AGS), headquartered in New York City. The acquisition builds on a two-year partnership and combines SpeedX's last-mile delivery expertise with AGS's focus on customs brokerage and freight forwarding, building up to an integrated supply chain suite of services.

All current NHDA last-mile delivery 3PL members are listed in the following table. Collectively, NHDA members account for over 70% of residential big and bulky goods deliveries and setups, utilizing thousands of delivery teams and logistics professionals across the country.

Table 4. NHDA Last-Mile 3PL Members

Company Name	City	State	Web Page
AIT Worldwide Logistics	Allentown	PA	https://www.aitworldwide.com/
ArcBest Final Mile	Fort Smith	AR	https://arcb.com/shippers/solutions/retail/final-mile
Aria Logistics	Englewood	NJ	https://arialogistics.com/
Bungii	Overland Park	KS	https://bungii.com/
Colemen Moving Services	Midland City	VA	https://www.colemanallied.com/residential-movers/
Diakon Logistics	Austin	TX	https://www.diakonlogistics.com/
Diverse Logistics and Distribution, LL	Tampa	FL	https://www.diverselogistics.com/
Fidelitone Last Mile	Wauconda	IL	https://www.fidelitone.com/
FragilePak	Oakland	CA	https://www.fragilepak.com/
GEODIS (FGO Logistics)	Elmwood Park	NJ	https://www.fgologistics.com/
Hilldrup	Stafford	VA	https://www.hilldrup.com/
Home Delivery Inc.	Rodanthe	NC	https://www.homedeliveryinc.com/
HomeDeliveryLink, Inc.	San Juan Capistrano	CA	https://www.homedeliverylink.com/
Hub Group	Oak Brook	IL	https://www.hubgroup.com/
J.B. Hunt - Last Mile	Lowell	AR	https://www.jbhunt.com/
Liberty Transportation	Greensburg	PA	http://libertytran.com/
LX Pantos America	Englewood Cliffs	NJ	https://www.lxpantos.com/en/company/global-networks/north-america.do
Maersk Final Mile	Brea	CA	https://delivers.maersk.com/last-mile/
Max Services LLC	Charlottesville	VA	https://maxservicesusa.com/home/
Mega Brothers Logistics, Inc	Davie	FL	https://megabrotherslogistic.com/
Metro Supply Chain	Montreal	QC	https://www.metroscg.com/solutions/transportation-solutions/last-mile-delivery-solutions/
NXTPoint Logistics	Jacksonville	FL	https://nxtpointlogistics.com/
PTG Logistics	Mason	OH	https://www.ptglogistics.com/
Pulse Final Mile	Anaheim	CA	https://pulsefinalmile.com/
RAS Delivery	Elkhart	IN	https://raslogistics.com/
RXO Last Mile	Marietta	GA	https://rxo.com/
Ryder Last Mile	New Albany	OH	https://ryder.com/
Speedy Delivery LLC	Richland	WA	https://www.speedydeliveryllc.com/
Spirit Logistics Network	Springfield	NJ	https://spiritln.com/
Summit Delivery Services, LLC	Gallatin	TN	https://summitdeliveryservices.com/
TopHAT Logistical Services	Lake Geneva	WI	https://www.tophatls.com/
UST Logistical Systems	Greenville	SC	https://uste3.com/
Werner Final Mile	Monroe	CT	https://finalmile.werner.com/
World Class Final Mile	Tampa	FL	https://worldclassfinalmile.com/

Summary

The U.S. Big and Bulky Last-Mile Delivery Market is influenced by various economic factors, including fuel costs, rising labor expenses, real estate inflation, and the growth of e-commerce. These factors affect delivery efficiency and overall costs. Advances in technology and automation are enhancing operations, while increased competition is fostering innovation.

There is considerable uncertainty surrounding the newly imposed import tariff levels. However, we believe that the most significant effect on big and bulky last-mile delivery 3PLs will stem from a decrease in consumer spending. Since much of the demand for last-mile delivery is closely linked to consumer behavior, we see this as a headwind. This situation is also a factor in our lower growth projections from 2024 to 2026.

Consumer expectations for faster and more reliable services are prompting 3PLs to adapt and innovate continuously. The big and bulky segment is on the brink of further transformation, driven by innovations such as electric vehicles, AI-driven logistics, and urban micro-fulfillment hubs.

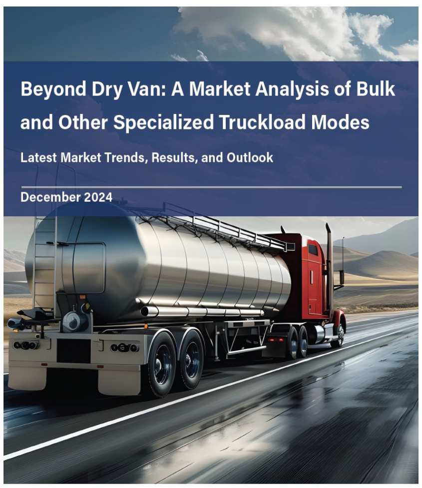
Having an exceptional customer experience is a crucial competitive differentiator. 3PLs that optimize their delivery processes and uphold high service standards will be best positioned for success in this evolving market.

Market Research

New Releases from Armstrong & Associates, Inc.

Expert Information Service:
A&A's premium market research and online 3PL guide.

[Expert Information Service (E.I.S.)]
Our premium market research and analysis offering includes access to our eight most popular 3PL market research reports and a subscription to our leading 3PL guide, Who's Who in Logistics Online. Phone consulting is available.



Armstrong & Associates, Inc. | Phone: +1-800-525-3915 | Website: www.3PLogistics.com | Email: Armstrong@3PLogistics.com

Beyond Dry Van: A Market Analysis of Bulk and Other Specialized Truckload Modes

This report analyzes the U.S. for-hire truckload market by segment, compares dry van against the bulk, flatbed, and refrigerated truckload segments, and provides estimates for all modes/trailer types from 2017-2027.

This report is part of A&A's premium market research Expert Information Service (E.I.S.). (Note: This report is downloadable as an Adobe PDF file with a single user license.)

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Atlantic Crossing: A Comparative European 3PL Market Analysis

In this report A&A compares the overall 3PL market and segment growth in Europe to global, North America, and other key regions and countries for years 2016-2026E. The report also covers current disruptions impacting Europe's supply chain, top European ocean ports and rail initiatives, the warehousing landscape, M&A trends, and more. As part of its analysis, A&A compiled this list of the Top 50 Europe-based 3PLs.

This report is part of A&A's premium market research Expert Information Service (E.I.S.). (Note: This report is downloadable as an Adobe PDF file with a single user license.)

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Divergence – Latest Third-Party Logistics Market Results and Outlook

This analysis explores the latest trends in the 3PL industry and its major segments, latest trends and estimates in the U.S. and Global 3PL Markets, including the Top 50 U.S. and Global 3PLs and 3PL M&A activity. The report also contains A&A's lists of the Top 50 Global 3PLs and Top 50 U.S. 3PLs for 2023.

This report is part of A&A's premium market research Expert Information Service (E.I.S.). (Note: This report is downloadable as an Adobe PDF file with a single user license.)