

Seeking Zen: A Post-Pandemic 3PL Market

Latest Third-Party Logistics Market Results and Predictions for 2021

Including Estimates for 190 Countries

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ABOUT ARMSTRONG & ASSOCIATES, INC.

Armstrong & Associates, Inc. (A&A) was established in 1980 to meet the needs of a newly deregulated domestic transportation market. Since then, through its leading Third-Party Logistics (3PL) market research and history of helping companies outsource logistics functions, A&A has become an internationally recognized key resource for 3PL market information and consulting.

A&A's mission is to have leading proprietary supply chain knowledge and market research not available anywhere else. As proof of our continued work in supporting our mission, A&A's 3PL market research is frequently cited in media articles, publications, and securities filings by publicly traded 3PLs. In addition, A&A's email newsletter currently has over 88,000 subscribers globally.

A&A's market research complements its consulting activities by providing continually updated data for analysis. Based upon its unsurpassed knowledge of the 3PL market and the operations of leading 3PLs, A&A has provided strategic planning consulting services to over 30 3PLs, supported 24 closed investment transactions, and provided advice to numerous companies looking to benchmark existing 3PL operations or outsource logistics functions.

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COVID, Volatility and the Reopening

Figure 1. U.S. 3PL Market 2010 - 2021E (US\$ Billions)

Table 1. U.S. 3PL Market Growth by Segment

International Transportation Management (ITM)

Table 2. Top 25 Global Freight Forwarders*

Table 3. Top Global Freight Forwarders 2020 vs. 2019 Select Providers Comparison

Dedicated Contract Carriage (DCC)

Domestic Transportation Management (DTM)

Value-Added Warehousing and Distribution (VAWD)

Figure 2. U.S. 3PL Market Segment Net Revenues (US\$ Millions) and CAGRs*

Table 4. U.S. 3PL Segment Growth Predictions for 2021

Top U.S. 3PLs

Table 5. Top 50 U.S. 3PLs by Gross Logistics Revenue

Global Logistics Market and Third-Party Logistics Revenues

Table 6. 2020-2021E Global Logistics Market and 3PL Segment Revenues by Country/Region (US\$ Billions)

Top Global 3PLs

Table 7. Top 50 Global 3PLs by Gross Logistics Revenue

Figure 3. Top 50 Global 3PLs by Country

Merger and Acquisition Activity

Figure 4. 3PL Acquisitions over \$100 Million 1999-July 2021

Market Research

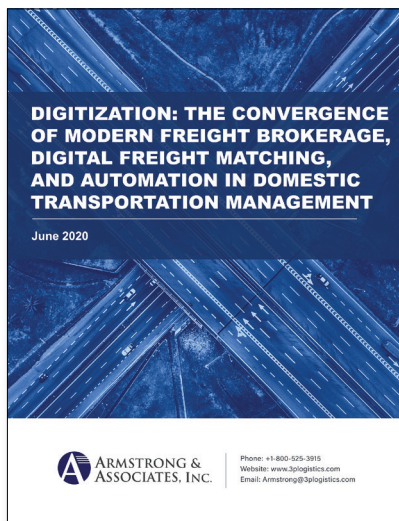
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Expert Information Service:
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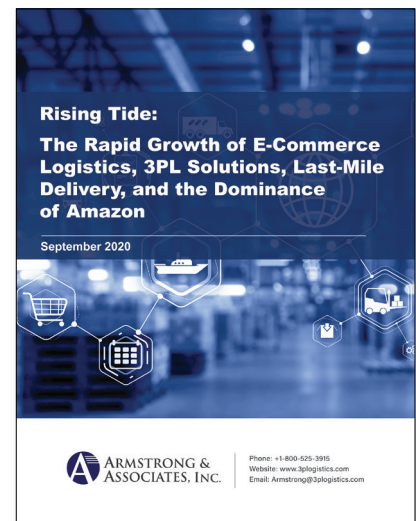
Digitization – The Convergence of Modern Freight Brokerage, Digital Freight Matching, and Automation in Domestic Transportation Management

Since our first report on Digital Freight Matching (DFM) in 2016 where we dubbed the term “Digital Freight Matching”, there has been increasing focus on these companies which have been seen by investors as market disruptors. This report details the convergence of DFM, modern Domestic Transportation Managers, and Digital Freight Brokers. It provides insights into what systems drive a 3PL's classification as a DFB and what systems can be deployed to augment a TMS and digitalize a DTM/Freight Brokerage operation.



Increasingly Strategic – Trends in 3PL / Customer Relationships

This definitive analysis is an expanded update of Armstrong & Associates' best-selling report. From its analysis of over 7,700 current 3PL customer relationships in 44 countries, totaling nearly 21,000 services, the report identifies and details key trends in outsourced third-party logistics provider (3PL) customer relationships. Armstrong & Associates has been tracking and analyzing 3PL/ Customer relationships for over a decade with ever-increasing detail.



Rising Tide – The Rapid Growth of E-Commerce Logistics, 3PL Solutions, Last-Mile Delivery, and the Dominance of Amazon

This comprehensive report covers the growth of e-commerce logistics in the U.S., e-commerce fulfillment and last-mile delivery, third-party logistics provider alternatives to Amazon, Amazon's leading market position, and an “apples-to-apples” cost comparison between Fulfillment by Amazon (FBA) and 3PL solutions using our proprietary e-commerce fulfillment pricing benchmarks from 21 3PLs representing over 1,000 customers.