

# Longevity:

## Insights and Analysis of the Global and Regional Spare/Service Parts 3PL Markets

---

March 2022



ARMSTRONG &  
ASSOCIATES, INC.

Phone: +1-800-525-3915

Website: [www.3plogistics.com](http://www.3plogistics.com)

Email: [Armstrong@3plogistics.com](mailto:Armstrong@3plogistics.com)

## **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.

All Rights Reserved.

No part of this publication may be reproduced, stored in a retrieval system or transmitted in any form by any means, electronic, mechanical, photocopied, recorded or otherwise, without the prior permission of the publisher, Armstrong & Associates, Inc.

The facts of this report are believed to be correct at the time of publication but cannot be guaranteed. Please note that the findings, conclusions and recommendations that Armstrong & Associates delivers will be based on information gathered in good faith from both primary and secondary sources, whose accuracy we are not always in a position to guarantee. As such, Armstrong & Associates can accept no liability whatsoever for actions taken based on any information that may subsequently prove to be incorrect.



---

# Contents

<b>Global Spare/Service Parts (SPL) 3PL Market and Key Regions</b>	<b>1</b>
<b>Major SPL 3PL Vertical Industries and Growth</b>	<b>3</b>
<b>Major SPL 3PLs</b>	<b>6</b>
CEVA Logistics	6
Choice Logistics	8
DB Schenker	11
DHL Supply Chain's Service Logistics	14
Dimerco Express Group	16
FedEx Critical Inventory Logistics	17
Horizon Air Freight	19
Kuehne + Nagel	20
MNX Global Logistics	22
Penske Logistics	24
Ryder Spare Parts Operations	25
UPS Service Parts Logistics	29

# Global Spare/Service Parts (SPL) 3PL Market and Key Regions

**Figure 1.** Global SPL 3PL Market 2016-2023E (US\$ Billions)

**Figure 2.** SPL 3PL Market by Key Regions and Countries 2016-2023E (US\$ Millions)

# Major SPL 3PL Vertical Industries and Growth

**Table 1.** Global SPL 3PL Revenue Growth by Vertical Industry and Select Sub Segments

**Figure 3. Asia Pacific SPL 3PL Revenue Growth by Vertical Industry - 2016-2023E (US\$ Millions)**

**Figure 4. North America SPL 3PL Revenue Growth by Vertical Industry – 2016-2023E (US\$ Millions)**

**Figure 5. Europe SPL 3PL Revenue Growth by Vertical Industry – 2016-2023E (US\$ Millions)**



# Major SPL 3PLs

**CEVA Logistics**

**CEVA's Automotive Customers**

## **Anji-CEVA Automotive Process**

## **Choice Logistics**

### **Choice Logistics' Global Network**

## **Choice Logistics' IOR Network**

## **Choice's Life Cycle Logistics Solutions**

## **Choice's Target Markets**

## **DB Schenker**

## **DB Schenker Automotive Supply Chain Solutions**

## **DB Schenker's Automotive Supply Chain Process**

## **DB Schenker's AOG Network**



## **DHL Supply Chain's Service Logistics**

**Storage & inventory management**

**Integrated transport management**

**Reverse logistics**

**Value-added services**

## **Markets/Industries Served**

## **Technology**

## **Dimerco Express Group**

### **Primary Dimerco Served Industries**

## **FedEx Critical Inventory Logistics**

## **FedEx Transportation Options Portfolio**

## **FedEx Global Distribution Center**

## **Forward Stocking Location Network**

## **FedEx's Forward Stocking Location and Distribution Center Network**

### **Seryices**

**Horizon Air Freight**

## Kuehne + Nagel

## **Kuehne + Nagel's AOG Network**



## **MNX Global Logistics**

### **MNX's Global Network**

## **MNX's Global Services Portfolio**

## **Penske Logistics**

### **Penske's U.S. SPL network**

## **Ryder Spare Parts Operations**

## **Ryder's Mexico Service Parts Overview**

## **Ryder SPO OEM Relationships in Mexico**

## **Ryder's Service Parts Coverage and Infrastructure (Q3-2021)**

### **Success Story - Toyota SPO**

### **Operational Environment**

## **Upcoming Projects**

## **UPS Service Parts Logistics**

### **UPS Service Parts Logistics Capabilities by Major Region**



## **UPS Post Sales Services**

## **Integration with UPS Transportation Services**

## **Technology**

# Market Research

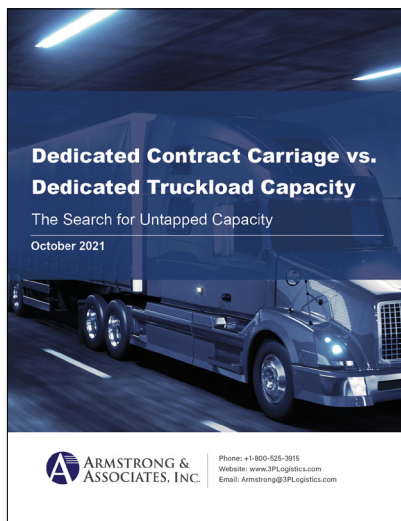
## New Releases from Armstrong & Associates, Inc.



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

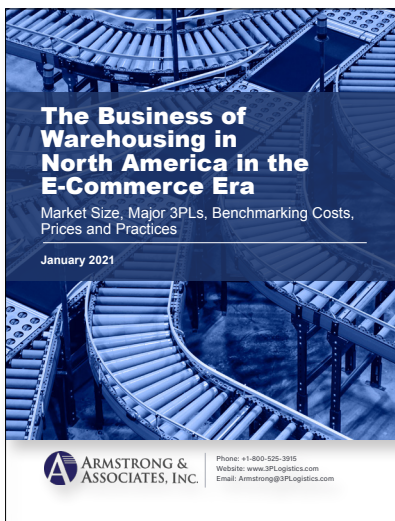
### Expert Information Service (E.I.S.)

Our premium market research and analysis offering includes access to our most popular 3PL market research reports and a subscription to our leading 3PL guide, *Who's Who in Logistics Online*. Discounted phone consulting is available.



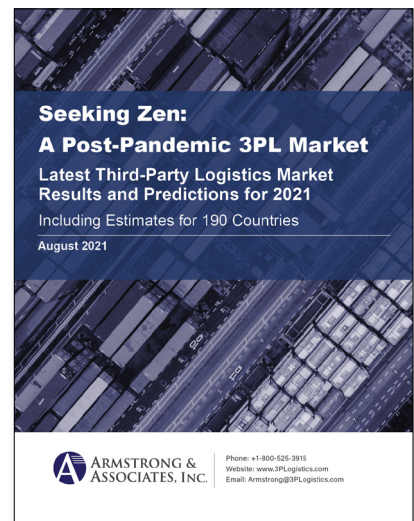
### Dedicated Contract Carriage vs. Dedicated Truckload Capacity - The Search for Untapped Capacity

This report provides background information on the history of the dedicated transportation market and growth trends. The Dedicated Contract Carriage (DCC) and Dedicated Truckload Capacity (DTC) segments are compared and contrasted. The report covers historical and projected estimates for DCC and DTC (2010-2023E), the different characteristics by segment, contract terms, profitability, power units, equipment assignment, industries served, lease versus truckload providers, the 25 largest U.S. DCC providers and more.



### The Business of Warehousing in North America – 2021 Market Size, Major 3PLs, Benchmarking Costs, Prices and Practices

This major market research report on North American warehousing provides updates on facility sizes, capacity, revenues, pricing (including e-commerce rates), and commodities handled. Operating margins are provided for contract warehousing operations. Expected operating margins and profitability measures are compared to actual results. Statistical analyses detail the effects of open book relationships and leasing, versus ownership on overall warehouse profitability. E-commerce logistics costs, 3PL revenue, growth rates, and for the first time, e-commerce fulfillment benchmark rates are also covered. In addition, warehouse rents and vacancy rates, customer service trends, key performance indicators, value-added services and warehouse management systems used and A&A's list of Top 50 North American Value-Added Warehousing and Distribution (VAWD) third-party logistics providers list is included.



### Seeking Zen – Latest Third-Party Logistics Market Results and Trends for 2021 Including Estimates for 190 Countries

This definitive analysis explores the latest trends in the third-party logistics industry and its major segments. 2020 results and estimates for 2021 are included. Historical trends and growth by 3PL segment are detailed. A&A's latest Global 3PL market estimates, covering seven major regions comprising 190 countries, are provided. Total and segment 3PL revenues and logistics spend by country and region are included. The report also contains A&A's lists of the Top 50 Global 3PLs, Top 50 U.S. 3PLs and Top 25 Global Freight Forwarders for 2020.

New to the report this year is a year-over-year comparison of 12 of the top 25 global freight forwarders and how they fared in 2020 compared to 2019.

Reports are available for purchase at <http://www.3plogistics.com>