

# Making it Count:

## Big and Bulky Last-Mile Delivery

### in the United States – 2022

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Phone: +1-703-931-6324

Website: [www.nationalhomedeliveryassociation.com](http://www.nationalhomedeliveryassociation.com)

Email: [blecos@lecosandassociates.com](mailto:blecos@lecosandassociates.com)

Phone: +1-800-525-3915

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

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

## **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. 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 40 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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## 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, employment, 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). 2021 last-mile delivery revenues of the 3PLs analyzed range from \$7 million to \$1 billion and represent 40% of the estimated \$9.3 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 parcel) from an origin 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

**Figure 1. U.S. 3PL Big and Bulky Last-Mile Delivery Market (Gross Revenue in US\$ Billions) - 2017-2025E**

### **Market Growth Drivers and Trends Outlook**



## Employment Trends and Use of Independent Contractor Trucking Capacity

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

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

**Table 1. Owner Operator / Independent Contractor Drivers vs. Employee Drivers**



**Figure 4. Driver Support / Installer Labor Type as a Percent of Total**

**Figure 5. Use of Freight Brokerage over the next 2-3 Years**

**Figure 6. Percent of Total Equipment by Equipment Type**

### **Customer Trends and Revenue by Vertical Industry**

**Figure 7. 3PL Big and Bulky Last-Mile Deliveries by Commodity / Industry - 2021**

**Figure 8. 3PL Big and Bulky Last-Mile Gross Revenue by Commodity / Industry (US\$ Millions) - 2021**

## The Competitive Landscape

**Figure 9. J.B. Hunt vs. XPO Logistics Domestic Last-Mile Delivery Gross Revenue Growth (US\$ Millions) - 2017-Q3 2022**



**Table 2. NHDA Last-Mile 3PL Members**