



CO-MANAGING THE TURBULENCE: TRENDS IN 3PL / CUSTOMER RELATIONSHIPS - 2023

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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 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 last three years in third-party logistics have affirmed that during global supply chain shocks and ongoing uncertainty, relationships between a 3PL (third-party logistics provider) and shipper are critical both strategically and tactically. From pivoting manufacturing, to navigating port congestion, shippers lean heavily onto existing 3PL partners to resolve issues. The booming post-Covid shutdown growth in 2021 led to growth in more transactional relationships just to meet surging demand. Shippers readily tapped into 3PL's flexible operations to scale up and down to meet extraordinary changes in demand.

2. Global 3PL Value-Added Services

Figure 1. Third-Party Logistics Value-Added Services and Capabilities

Table 1. Top Global Fortune 500 Buyers of 3PL Services

Figure 2. Domestic Fortune 500 Use of 3PLs 2008 – 2022

3. Global 3PL Revenue by Industry Vertical

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4. Global 3PL Services and Relationships

Figure 4. Frequency of 3PL Services by Category

Table 2. Average Number of 3PL Services Provided by Industry

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Table 3. Average Number of 3PL Services Provided by Industry

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Table 5. Most Important 3PL Services by Fortune List Rank

5. Lead and Strategic Relationships

Table 6. Strategic Relationships by Industry

6. 3PL Revenue for Industry Verticals by Key Regions

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Figure 6. Asia Pacific 3PL Revenues by Industry from 2016 – 2023E (US\$ Billions)

6.2. Europe

Figure 7. Europe 3PL Revenues by Industry from 2016 – 2023E (US\$ Billions)

6.3. Central/South America

Figure 8. Central/South America 3PL Revenues by Industry from 2016 – 2023E (US\$ Billions)

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7. 3PL Services by Regions

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Table 8. China: 3PL Number of Services and Strategic Relationships

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Figure 14. China: Distribution of 3PL Customer Relationships by Industry Vertical

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Table 9. France: 3PL Number of Services and Strategic Relationships

Figure 15. France: Distribution of 3PL Services as a Percent of Total

Figure 16. France: Distribution of 3PL Customer Relationships by Industry Vertical

8.3. Germany

Table 10. Germany: 3PL Number of Services and Strategic Relationships

Figure 17. Germany: Distribution of 3PL Services as a Percent of Total

Figure 18. Germany: Distribution of 3PL Customer Relationships by Industry Vertical

8.4. Hong Kong

Table 11. Hong Kong: 3PL Number of Services and Strategic Relationships

Figure 19. Hong Kong: Distribution of 3PL Services as a Percent of Total

Figure 20. Hong Kong: Distribution of 3PL Customer Relationships by Industry Vertical

8.5. Japan

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8.6. Mexico

Table 13. Mexico: 3PL Number of Services and Strategic Relationships

Figure 23. Mexico: Distribution of 3PL Services as a Percent of Total

Figure 24. Mexico: Distribution of 3PL Customer Relationships by Industry Vertical

9. 3PL Revenues and Customer Relationships by Key Industries

9.1. Automotive

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9.1.2. DSV A/S

9.1.3. DHL Supply Chain & Global Forwarding (DHL SC & GF)

9.2. Retailing

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9.2.3. *DHL Supply Chain & Global Forwarding (DHL SC & GF)*

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9.4.2. GXO/RXO

9.4.3. C.H. Robinson

Market Research

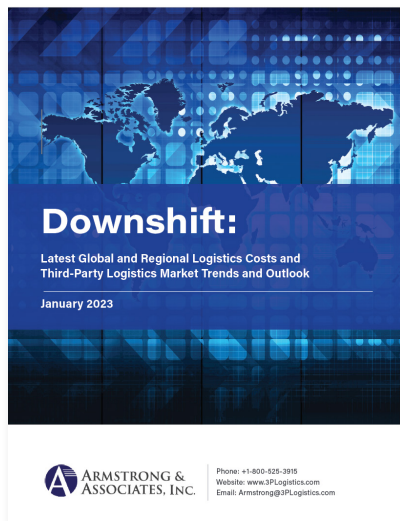
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This report provides Global Third-Party Logistics Market and Logistics Cost estimates from 2016-2025. Besides that, the report also covers revenues and growth rates by region and country and by 3PL segments including the Global Spare/Service Parts Logistics and Time-Critical Delivery Markets for the same years, the Top 50 Global 3PLs and their competitive differentiation, among other trends and changing 3PL requirements to further minimize supply chain risk.

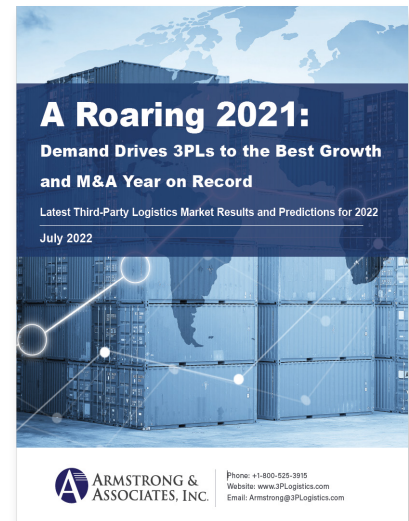
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Making it Count: **Big and Bulky Last-Mile Delivery** **in the U.S. - 2022**

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).

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.)



A Roaring 2021: **Demand Drives 3PLs to the** **Best Growth and M&A Year on** **Record**

This definitive analysis explores the latest trends in the third-party logistics industry and its major segments. 2021 results and estimates for 2022 are included, and 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 within. 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 2021.

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