# Asia-Pacific Third-Party Logistics (3PL) Market Size & Share Analysis - Growth Trends and Forecast (2026 - 2031)

> **Industry:** Third-Party & Contract Logistics (3PL/4PL) (Logistics & Supply Chain)
> **Source:** [https://www.mordorintelligence.com/industry-reports/asia-pacific-third-party-logistics-market](https://www.mordorintelligence.com/industry-reports/asia-pacific-third-party-logistics-market)
> **Scraped Date:** 2026-09-17

## Executive Market Summary

| Market Metric | Details |
| :--- | :--- |
| **Base Market Size** | USD 504 billion |
| **Projected Forecast (2031)** | USD 504 billion |
| **Growth Rate (CAGR)** | 7.60 % |
| **Largest Market Region** | N/A |
| **Fastest-Growing Region** | N/A |

## Market Visualizations & Infographics

```
![Major players in Asia-Pacific Third-Party Logistics (3PL) industry](images/chart_2.png)

![Asia-Pacific Third-Party Logistics (3PL) Market Size](images/chart_3.png)

![Asia-Pacific Third-Party Logistics (3PL) Market Share by Service Type, 2025](images/chart_4.png)

![Asia-Pacific Third-Party Logistics (3PL) Market Share by Logistics Model, 2025](images/chart_5.png)

![Asia-Pacific Third-Party Logistics (3PL) Market Concentration](images/chart_6.png)

![Icon](images/chart_7.png)

![footer background image](images/chart_9.png)

![Mordor Intelligence on Facebook](images/chart_11.svg)

![Mordor Intelligence on Pinterest](images/chart_13.svg)

![Mordor Intelligence on Instagram](images/chart_14.svg)

![ESOMAR](images/chart_16.png)

![GPTW](images/chart_18.png)
```

## Comprehensive Research Analysis

### Overview Points List Flex 49 Share Feature End

Market OverviewStudy Period | 2020 - 2031 |
Forecast Data Period | 2026 - 2031 |
Base Year Market Size (2025) | USD 431.38 Billion |
Market Size (2026) | USD 504 Billion |
Market Size (2031) | USD 726.90 Billion |
Growth Rate (2026 - 2031) | 7.60 % |
Market Concentration | Low |

Major Players*Disclaimer: Major Players sorted in no particular order



|

### Market Overview

Asia-Pacific Third-Party Logistics (3PL) Market Analysis by Mordor IntelligenceThe Asia-Pacific Third-Party Logistics Market size is projected to expand from USD 431.38 billion in 2025 and USD 504 billion in 2026 to USD 726.90 billion by 2031, registering a CAGR of 7.60% between 2026 to 2031.

A sustained push from regional trade integration and e-commerce fulfillment is raising the strategic role of outsourced logistics across key corridors. The Asia-Pacific third-party logistics market benefits from lower trade friction under RCEP, which improves the business case for asset-light orchestration and cross-border consolidation. Large platform operators are investing in automation and multi-temperature networks, which raises service benchmarks that mid-sized providers then match to stay relevant. The Asia-Pacific third-party logistics market is also adapting to compliance intensity in pharmaceuticals and data stewardship, creating opportunities for accredited providers with auditable systems. Scale 3PLs that combine digital control towers with selective infrastructure control are positioned to capture more sticky contracts as the Asia-Pacific third-party logistics market matures.

Key Report Takeaways* By service, Domestic Transportation Management led with 46.12% of the Asia-Pacific third-party logistics (3PL) market share in 2025. Value-Added Warehousing and Distribution is projected to be the fastest-growing service at a 7.84% CAGR through 2031.
* By end-user industry, Retail and E-commerce accounted for 27.94% in the Asia-Pacific third-party logistics (3PL) market size in 2025. Life Sciences and Healthcare is projected to record the highest growth at an 8.21% CAGR to 2031.
* By logistics model, Asset-Light operations held 53.41% in 2025. Hybrid approaches are projected to post the fastest growth at a 7.63% CAGR through 2031.
* By geography, China commanded 58.74% in 2025. India is projected to expand at an 8.62% CAGR through 2031.

### Key Market Trends

Market Trends and InsightsDrivers Impact Analysis of Asia-Pacific Third-Party Logistics (3PL) Market*Driver | (~) % Impact on CAGR Forecast | Geographic Relevance | Impact Timeline |
E-commerce Boom Across Region | +2.8% | Global, with concentration in China, India, Southeast Asia | Short term (≤ 2 years) |
Regional Trade Agreement Implementation | +1.5% | RCEP member states (ASEAN+5), spill-over to South Asia | Medium term (2-4 years) |
Digital Logistics Platform Proliferation | +1.1% | Urban centers in China, India, Singapore; expanding to Indonesia, Philippines | Short term (≤ 2 years) |
Cold Chain Infrastructure Development | +0.9% | Vietnam, Thailand, Malaysia, Singapore; rising in India | Medium term (2-4 years) |
Automotive and Electronics Manufacturing Growth | +0.8% | China, Vietnam, Thailand, India (EV corridors) | Long term (≥ 4 years) |
Outsourcing Trend by SMEs | +0.5% | ASEAN markets, India; urban-to-rural expansion | Short to Medium term (1-3 years) |
Source: Mordor Intelligence |

### Competitive Landscape

Competitive Landscape

The market remains fragmented overall, although scale advantages, platform ecosy stems, and compliance requirements are gradually concentrating high-value contracts among leading regional and global 3PL providers. The market features a mix of global integrators, large regional operators, and technology-led specialists that compete across service depth, compliance, and capital deployment. DHL’s programmatic investments in Life Sciences and Healthcare across Asia-Pacific illustrate how incumbents are deepening specialization where compliance and reliability extend contract duration and yield. Nippon Express reorganized its East Asia leadership and simplified Indonesian operations, which enhances network cohesion and management accountability across a large geographic theater. The Asia-Pacific third-party logistics market also sees deepening ties between freight forwarding and engineered transport for aerospace and project cargo, which relies on asset access and certifications. CEVA’s expanding aviation logistics relationships and regional distribution mandates align with that strategy and build sticky volumes around specialized verticals.

Technology remains a competitive wedge as control towers and optimization engines determine cost-to-serve at scale. oTMS and Shipsy show how regional SaaS platforms can standardize milestones, automate tendering, and route shipments under tight SLAs for customers that expect consumer-grade visibility. The Asia-Pacific third-party logistics market is tilting toward providers that integrate these layers with warehouse automation and audited processes for pharma and high-value electronics. Digital workflows also simplify cross-border documentation and speed customs clearance in markets where single window systems have matured, which strengthens differentiated propositions for time-sensitive goods. At the same time, the Asia-Pacific third-party logistics market confronts margin pressure in commoditized drayage and low-barrier routes, which pushes operators to climb the value stack or focus on route expertise where dense local knowledge is valuable.

Platform-backed ecosystems add a structural consideration as large marketplaces internalize more fulfillment and transport. JD Logistics’ sustained automation footprint shows how platform scale can lift service bars across key urban centers and alter capacity planning in adjacent third-party networks. Independent 3PLs in the Asia-Pacific third-party logistics market adjust by leaning into cross-border brokerage, heavy-compliance verticals, value-added services, and collaboration with marketplaces through APIs and service-level frameworks. The most resilient operators align selective asset control with partner-based expansion to balance utilization and responsiveness. The Asia-Pacific third-party logistics market is moving toward standardized performance dashboards, auditable compliance, and multi-mode orchestration that links origin to last mile through a unified engagement model. This convergence rewards providers that can document reliability and scale compliance across multiple jurisdictions.

Asia-Pacific Third-Party Logistics (3PL) Industry Leaders* DHL Supply Chain & Global Forwarding

* Sinotrans Ltd.

* Kintetsu World Express

* Nippon Express Holdings

* Yusen Logistics (NYK)

* *Disclaimer: Major Players sorted in no particular order


### Component Component 3 Scope Of The Report Bottom

Asia-Pacific Third-Party Logistics (3PL) Market Report ScopeThe Asia-Pacific Third-Party Logistics Market Report is Segmented by Service (Domestic Transportation Management, International Transportation Management, Value-Added Warehousing and Distribution (VAWD)), by End-User Industry (Automotive, Energy and Utilities, Manufacturing, Life Sciences and Healthcare, Technology and Electronics, Retail and E-commerce, Consumer Goods and FMCG, Food and Beverages, and Others), by Logistics Model (Asset-Light (Management-Based), Asset-Heavy (Own Fleet and Warehouses), and Hybrid), and by Geography (China, India, Japan, South Korea, Singapore, Vietnam, Indonesia, Australia, and the Rest of Asia-Pacific). The Market Forecasts are Provided in Terms of Value (USD).

By ServiceDomestic Transportation Management | Road |
| Air |
| Others |
International Transportation Management | Road |
| Air |
| Sea |
| Multimodal / Intermodal |
Value-Added Warehousing and Distribution (VAWD) |

### Segmentation Accordion Item

By GeographyChina |
India |
Japan |
South Korea |
Singapore |
Vietnam |
Indonesia |
Australia |
Rest of Asia-Pacific |

## Frequently Asked Questions

#### What is the size and growth outlook for the Asia-Pacific third-party logistics market through 2031?

The Asia-Pacific third-party logistics market size was USD 431.38 billion in 2025 and is projected to reach USD 726.90 billion by 2031 at a 7.6% CAGR over 2026-2031.

#### Which service category will grow the fastest in the Asia-Pacific third-party logistics market?

Value-Added Warehousing and Distribution is projected to be the fastest-growing service at a 7.84% CAGR to 2031 as multi-temperature and micro-fulfillment capabilities scale.

#### Which end-user segment leads demand in the Asia-Pacific third-party logistics market

Retail and E-commerce contributed 27.94% in 2025, supported by dense order flows and automation-led fulfillment, while Life Sciences and Healthcare shows the highest growth trajectory.

#### What operating model is gaining the most momentum in the Asia-Pacific third-party logistics market

Hybrid strategies are projected to grow at 7.63% as providers balance dedicated assets with flexible brokerage to handle volatility and peak demand.

#### Which geography offers the fastest expansion in the Asia-Pacific third-party logistics market

India is projected to expand at an 8.62% CAGR, supported by manufacturing shifts and trade facilitation through a national single window.

#### How are leading providers differentiating in the Asia-Pacific third-party logistics market

Providers are deepening specialization in regulated chains like pharma, investing in automation, aligning with digital control towers, and standardizing cross-border compliance programs.