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/global-3pl-market
> **Scraped Date:** 2026-09-17

Executive Market Summary

Market Metric	Details
Base Market Size	USD 1.22 trillion
Projected Forecast (2031)	USD 1.22 trillion
Growth Rate (CAGR)	5.27 %
Largest Market Region	N/A
Fastest-Growing Region	N/A

Market Visualizations & Infographics

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

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

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

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

![Third-Party Logistics (3PL) Market Growth Rate by Region](images/chart_6.png)

![Third-Party Logistics (3PL) Market Concentration](images/chart_7.png)

![footer background image](images/chart_10.png)

![Mordor Intelligence on Facebook](images/chart_12.svg)

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![ESOMAR](images/chart_17.png)

![GPTW](images/chart_19.png)
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Comprehensive Research Analysis

Overview Points List Flex 49 Share Feature End

Market OverviewStudy Period | 2020 - 2031 |
Market Size (2026) | USD 1.22 Trillion |
Market Size (2031) | USD 1.57 Trillion |
Growth Rate (2026 - 2031) | 5.27 % |
Fastest Growing Market | Asia Pacific |
Largest Market | Asia Pacific |
Market Concentration | Low |
Major Players*Disclaimer: Major Players sorted in no particular order

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Market Overview

Third-Party Logistics (3PL) Market Analysis by Mordor IntelligenceThe Third-Party Logistics (3PL) Market size is estimated at USD 1.22 trillion in 2026, and is expected to reach USD 1.57 trillion by 2031, at a CAGR of 5.27% during the forecast period (2026-2031).

Shippers are favoring variable-cost logistics partnerships that free capital for digital transformation and customer-experience investments. Asia-Pacific anchors volume growth on the back of manufacturing diversification and e-commerce intensity, while North America and Europe rely on nearshoring, automation, and data-driven control towers to offset wage inflation. Digital freight platforms, AI-enabled visibility suites, and hybrid logistics models are blurring the line between asset-light orchestration and selective asset ownership. At the same time, the Third Party Logistics Market faces exposure to fuel-price swings, warehouse-labor scarcity, and cybersecurity threats that demand both strategic hedging and technology hardening.

Key Report Takeaways* By service type, domestic transportation management captured 45.64% of the Third-Party Logistics (3PL) Market share in 2025 and is expanding at a 5.91% CAGR to 2031.
* By end user, manufacturing captured 29.15% of the Third-Party Logistics (3PL) Market size in 2025; life sciences and healthcare grow fastest at a 7.62% CAGR to 2031.
* By logistics model, Asset-light providers commanded 55.13% of global sales in 2025, yet the hybrid logistics model is pacing the field with a 6.54% CAGR through 2031.
* By region, Asia-Pacific contributed 41.02% to global revenue in 2025 and is forecast to post a 6.36% CAGR, the fastest among all regions in the Third-Party Logistics Market .

Key Market Trends

Market Trends and InsightsDrivers Impact Analysis of Third-Party Logistics (3PL) Market*Driver | (~) % Impact on CAGR Forecast | Geographic Relevance | Impact Timeline |
Explosive e-commerce & omni-channel fulfillment | +1.3% | Global, urban centers | Short term (≤ 2 years) |
Globalization & cross-border trade rebound | +0.9% | Global, APAC, North America | Medium term (2-4 years) |
Outsourcing for cost-efficiency & asset-light focus | +0.8% | Global, OECD economies | Medium term (2-4 years) |
AI-enabled control-tower logistics adoption | +0.7% | North America, Europe, advanced APAC | Medium term (2-4 years) |
Near-/friend-shoring redefining trade corridors | +0.6% | North America, Southeast Asia, Eastern Europe | Long term (≥ 4 years) |
ESG-driven “green logistics” premium services | +0.5% | EU core, spillover to North America and APAC | Long term (≥ 4 years) |
Source: Mordor Intelligence |

Competitive Landscape

Competitive Landscape

The Third-Party Logistics (3PL) Market remains moderately fragmented; the ten largest operators captured under 20% of 2025 revenue. Consolidation momentum persists, exemplified by Kuehne + Nagel’s USD 1.8 billion purchase of Apex Logistics that opened aerospace and high-tech verticals. Scale seekers pursue horizontal mergers for geographic reach and vertical additions[4]Kuehne + Nagel, “Annual Report 2024,” kuehne-nagel.com , such as customs brokerage, to broaden wallet share

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Digital freight marketplaces and 4PL orchestrators pressure incumbents on pricing transparency and API connectivity. Incumbents respond by buying tech startups, building in-house data teams, or launching venture arms. Niche specialists flourish in pharmaceutical cold chain, hazardous goods, and circular-economy reverse logistics, where certification hurdles deter new entrants. Sustainability is another battleground: CEVA’s USD 300 million sustainable aviation fuel pledge and DHL’s AMR rollout showcase how ESG commitments translate into commercial award criteria.

Wage inflation and automation gaps widen capability differences. Global integrators deploy robot fleets that lift throughput 30%, while mid-tier rivals lean on customer intimacy and regional insight. Cybersecurity maturity increasingly decides tender outcomes, with ISO 27001 certifications like Kerry Logistics’ 2025 award becoming check-box prerequisites. Overall, the Third-Party Logistics (3PL) Market rewards scale, sector specialization, and digital-first customer engagement while penalizing providers slow to modernize.

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

* Kuehne + Nagel International AG

* C.H. Robinson Worldwide Inc.

* DSV A/S

* CEVA Logistics

* *Disclaimer: Major Players sorted in no particular order

Scope Methodology P Space

Our study treats the third-party logistics (3PL) market as the total gross revenue earned worldwide by specialist providers that plan, execute, and monitor freight forwarding, contract warehousing, domestic and international transportation management, and related value-added services on behalf of shippers. All service revenues are recorded at the point the 3PL bills its customer; re-billed carrier charges are included as part of that revenue pool.

Scope exclusion: Courier express packages below 70 lbs handled by dedicated parcel networks are not counted.

Segmentation Container

* By Service* Domestic Transportation Management (DTM)* Roadways
* Railways
* Airways
* Waterways

* International Transportation Management (ITM)* Roadways
* Railways
* Airways
* Waterways

* Value-Added Warehousing and Distribution (VAWD)

* By End User* Automotive
* Energy and Utilities
* Manufacturing

* Life Sciences and Healthcare
* Technology and Electronics
* Retail and E-commerce
* Consumer Goods and FMCG
* Food and Beverages
* Others

* By Logistics Model* Asset-Light (Management-Based)
* Asset-Heavy (Own Fleet and Warehouses)
* Hybrid

* By Region* North America* United States
* Canada
* Mexico

* South America* Brazil
* Argentina
* Chile
* Rest of South America

* Europe* Germany
* United Kingdom
* France
* Spain
* Italy
* Netherlands
* Russia
* Rest of Europe

* Asia-Pacific* China
* India
* Japan
* South Korea
* Singapore
* Vietnam
* Indonesia
* Australia
* Rest of Asia-Pacific

* Middle East and Africa* United Arab Emirates
* Saudi Arabia
* South Africa
* Nigeria
* Rest of Middle East and Africa

Frequently Asked Questions

What is the current valuation of the global Third-Party Logistics (3PL) Market ?

The Third-Party Logistics (3PL) Market size is USD 1.22 trillion in 2026 and is set to climb to USD 1.57 trillion by 2031.

Which region contributes the most revenue to 3PL services?

Asia-Pacific leads with 41.02% of global turnover in 2025 and is also the fastest-growing region.

Which service type is expanding the quickest?

Domestic transportation management is advancing at a 5.91% CAGR, driven by last-mile and same-day delivery demand.

Why is healthcare logistics growing so fast?

Biologics, cell-and-gene therapies, and stricter temperature-control mandates are pushing life sciences & healthcare to a 7.62% CAGR.

How are 3PL firms addressing labor shortages?

Providers are investing in autonomous mobile robots, predictive scheduling tools, and retention programs to cut dependence on scarce labor.

What role does sustainability play in logistics outsourcing decisions?

ESG mandates and carbon-pricing mechanisms such as the EU's CBAM are prompting shippers to favor 3PL partners with electric fleets and carbon-tracking dashboards.