

Pharmaceutical 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-pharmaceutical-3pl-market
> **Scraped Date:** 2026-09-17

Executive Market Summary

Market Metric	Details
Base Market Size	USD 73.11 billion
Projected Forecast (2031)	USD 73.11 billion
Growth Rate (CAGR)	7.47 %
Largest Market Region	N/A
Fastest-Growing Region	N/A

Market Visualizations & Infographics

! [Major players in Pharmaceutical 3PL industry] (images/chart_2.png)

! [Pharmaceutical 3PL Market (2025 - 2030)] (images/chart_3.png)

! [Pharmaceutical 3PL Market: Market Share by Service Type, 2025] (images/chart_4.png)

! [Pharmaceutical 3PL Market: Market Share by End User, 2025] (images/chart_5.png)

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! [Pharmaceutical 3PL Market Concentration] (images/chart_7.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 73.11 Billion |
Market Size (2031) | USD 104.69 Billion |
Growth Rate (2026 - 2031) | 7.47 % |
Fastest Growing Market | Asia-Pacific |
Largest Market | North America |
Market Concentration | Low |
Major Players*Disclaimer: Major Players sorted in no particular order

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Market Overview

Pharmaceutical 3PL Market Analysis by Mordor Intelligence
The Pharmaceutical 3PL Market size was valued at USD 68.03 billion in 2025 and estimated to grow from USD 73.11 billion in 2026 to reach USD 104.69 billion by 2031, at a CAGR of 7.47% during the forecast period (2026-2031). The growth reflects the widening range of temperature-sensitive products, tougher distribution regulations, and heightened outsourcing by small and mid-sized drug makers. Competitive intensity is rising as integrators expand dedicated healthcare networks, and investments in digital monitoring technologies deliver end-to-end shipment visibility. Demand for ultra-cold capabilities, driven by cell and gene therapies, is pulling 3PL capital toward cryogenic freezers, liquid-nitrogen shippers, and real-time IoT tracking. In parallel, the surge in e-pharmacies is parceling supply chains and pushing last-mile operators to guarantee product integrity down to the patient's doorstep. Asia-Pacific's manufacturing build-out and government healthcare spending amplify these trends, making the region the fastest-growing arena for specialized logistics contracts.

Key Report Takeaways* By service type, Domestic Transportation Management held 45.65% of the Pharmaceutical 3PL Market share in 2025. The Pharmaceutical 3PL Market for Value-Added Warehousing & Distribution is forecast to grow at an 8.31% CAGR between 2026-2031.

* By temperature type, non-cold chain services accounted for 63.25% of the Pharmaceutical 3PL market size in 2025. The Pharmaceutical 3PL Market for cold-chain offerings is expanding at a 10.14% CAGR between 2026-2031.

* By end user, pharmaceutical manufacturers commanded 48.40% of the Pharmaceutical 3PL market size in 2025. The Pharmaceutical 3PL Market for the e-pharmacy channel is advancing at an 11.22% CAGR between 2026-2031.

* Prescription drugs accounted for 54.20% of the pharmaceutical 3PL market in 2025, while cell and gene therapies are projected to grow at a 12.32% CAGR from 2026 to 2031.

* By region, North America led with 33.40% of the Pharmaceutical 3PL market revenue share in 2025. The Pharmaceutical 3PL Market for Asia-Pacific is projected to post the fastest 10.65% CAGR between 2026-2031.

Key Market Trends

Market Trends and Insights
Drivers Impact Analysis of Pharmaceutical 3PL Market*
river | (~) % Impact on CAGR Forecast | Geographic Relevance | Impact Timeline |

Specialty biologics need cold-chain rigor | +2.1% | North America, Europe, global deployments | Medium term (2-4 years) |

SME pharma outsourcing in emerging regions | +1.3% | Asia-Pacific, South America, Middle East | Medium term (2-4 years) |

GDP-driven real-time monitoring | +1.0% | Europe, North America, global | Short term (≤ 2 years) |

E-pharmacy parcelization | +1.8% | North America, Europe, developed Asia-Pacific | Short term (≤ 2 years) |

Post-COVID vaccine pipeline | +0.9% | Global | Medium term (2-4 years) |

IoT & blockchain visibility | +1.2% | North America, Europe, global | Medium term (2-4 years) |

Source: Mordor Intelligence |

Competitive Landscape

Competitive Landscape

Competition in the pharmaceutical 3PL market balances scale economics against niche specialization. DHL Supply Chain, UPS Healthcare, and FedEx Custom Critical anchor the top tier, leveraging multi-continent networks, GDP-compliant facilities, and aggressive acquisition pipelines. DHL's USD 2.2 billion five-year investment plan targets network densification and doubled life-science revenue by 2030, aided by its 2025 takeover of Cryopdp, a clinical-trial courier. UPS mirrors that strategy with purchases of temperature-controlled specialists Frigo-Trans and BPL, consolidating capabilities across Europe and North America.

Mid-cap players such as World Courier, Marken, and GEODIS carve defensible niches by excelling in time-critical therapeutic areas, clinical-trial supply, and value-added analytics. Their agility and therapy-specific know-how often attract biotech sponsors seeking bespoke solutions outside global integrators' standardized playbooks. Technology differentiators include blockchain-enabled provenance, digital twins for route simulation, and AI-assisted demand forecasting. Barriers to entry rise as certification costs, cryogenic infrastructure, and cybersecurity mandates escalate, yet regional champions still emerge by mastering local regulatory requirements and building pharmacist-level competence among frontline staff.

Long-run competitive advantage hinges on continuous innovation in packaging sustainability, carbon-neutral lane design, and integrated billing-plus-compliance dashboards. Partnerships with packaging manufacturers, sensor providers, and cloud analytics firms will dictate future winners as the pharmaceutical 3PL market shifts from transactional freight transactions to data-rich, risk-managed supply chain orchestration.

Pharmaceutical 3PL Industry Leaders* DHL Supply Chain & Global Forwarding

- * Kuehne + Nagel International AG

- * UPS Healthcare

- * FedEx Logistics

- * DB Schenker

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

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Scope Methodology P Space

This market covers third party logistics services used to store, handle, and move finished pharmaceutical and biopharmaceutical products under compliant distribution practices, across domestic and international routes, including temperature-sensitive shipments.

Scope exclusions: We exclude bulk active-ingredient freight, primary drug packaging line activity, and captive in-house logistics operations that are not billed as third party services.

Segmentation Container

- * By Service Type* Domestic Transportation Management (DTM)* Roadways

- * Railways

- * Airways

- * Waterways

- * International Transportation Management (ITM)* Roadways

- * Railways

- * Airways

- * Waterways

- * Value-Added Warehousing and Distribution (VAWD)
- * By Temperature Type* Cold Chain
- * Non-cold Chain
- * By End User* Pharmaceutical Manufacturers
- * Biotech and Biosimilar Manufacturers
- * Clinical Research and Trial Sponsors
- * Hospitals and Retail Pharmacies
- * Healthcare Distributors and Wholesalers
- * E-pharmacies and Direct-to-Patient Services
- * By Product Type* Prescription Drugs
- * OTC and Consumer Health Products
- * Biopharmaceuticals and Biosimilars (ex-CGT)
- * Cell and Gene Therapies
- * Vaccines and Blood-derived Products
- * Veterinary Pharmaceuticals and Animal Health Products
- * Medical Devices, Diagnostics and Combination Products
- * Clinical-trial Materials (Investigational Medicinal Products)
- * Others
- * 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* United Arab Emirates
- * Saudi Arabia
- * Turkey
- * Israel
- * Rest of Middle East
- * Africa* South Africa
- * Egypt
- * Nigeria
- * Kenya
- * Rest of Africa

Frequently Asked Questions

What is the projected growth rate of the pharmaceutical 3PL market between 2026 and 2031?

The pharmaceutical 3PL market is forecast to expand at a 7.47% CAGR, rising from USD 73.11 billion in 2026 to USD 104.69 billion by 2031.

Which service segment is expected to grow the fastest?

Value-Added Warehousing & Distribution leads with an 8.31% CAGR, reflecting demand for integrated storage, inventory and packaging services.

Why is Asia-Pacific the fastest-growing region for pharmaceutical 3PL services?

Manufacturing scale-ups in China and India, rising healthcare spending and ongoing infrastructure upgrades lift the region toward a 10.65% CAGR.

How are e-pharmacies changing pharmaceutical logistics?

E-pharmacies increase parcel-level, temperature-controlled deliveries directly to patients, boosting last-mile complexity and driving 11.22% CAGR for this end-user segment.

What technologies are most critical for ensuring compliance in pharmaceutical logistics?

IoT sensors for real-time monitoring, blockchain for immutable traceability and digital-twin analytics for proactive lane management are now central to GDP compliance.

What makes cell & gene therapy logistics uniquely challenging for 3PLs?

These therapies require cryogenic conditions below -150 °C, strict chain-of-identity processes and rapid, individualized delivery windows, demanding specialized infrastructure and 24/7 oversight.