

## **Project Logistics Market - Growth, Trends, Covid-19 Impact, and Forecasts (2023 - 2028)**

Market Report | 2023-01-23 | 160 pages | Mordor Intelligence

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### **Report description:**

#### Key Highlights

Project logistics involves an integrated process of planning, organization, managing, processing, and controlling the complete flow of goods, materials, and information associated with the successful completion of a project. Cargo with larger dimensions requires a completely different set of equipment, infrastructure, and experienced personnel. Dealing with a cargo of peculiar dimensions is always a challenge for a transporter. However, shippers and service providers are becoming more sophisticated in the transportation of oversized and heavyweight shipments. Manufacturing complexity also adds to the challenge. Parts and modular packages are being produced in far-flung parts of the world, then shipped to final destinations. The packages are more critical, requiring detailed planning. Getting transportation providers more involved in the early stages of the planning process has been a trend for the past five years.

Rising oil prices and a robust liquefied natural gas (LNG) and petrochemical construction market have been offering opportunities to the project logistics transportation industry since 2019.

Some established organizations carry out project logistics activities across the world. For instance, the Global Project Logistics Network (GPLN) is a network of independent small and medium project logistics forwarders. GPLN members handle a vast range of industrial projects, from infrastructure projects to major energy projects. The members provide services like transporting, packing/crating, and lifting heavy, oversized, and out-of-gauge cargo.

#### Project Logistics Market Trends

Increasing Usage of Renewable Energies Boosts Opportunities for Project Logistics Companies

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According to global energy sources, the decade-long trend of strong growth in renewable energy capacity continued in 2018, with global additions of 171 gigawatts (GW). It involves hydropower, wind energy, bioenergy, solar energy, and geothermal energy. The annual increase of 7.9% was bolstered by new additions from solar and wind energy, which accounted for 84% of the growth. Significantly, a third of global power capacity is from renewable energy. This trend is expected to continue in the coming years, in order to achieve the global climate objectives and sustainable development goals.

The positive future outlook for renewable energy is driving the current project logistics market. In order to generate the required amount of power in the future, the energy companies need to develop the necessary infrastructure, commence new projects, and install power generation equipment. This scenario is going to create demand for project logistics. Since 2012, about 70% of total turbine installations have been made in the last three months of the year. This late rush not only created huge opportunities for the project cargo companies, but also created third-quarter logistics booking bottleneck. To avoid this, construction companies are looking for multiple options. One option is to move components to installation sites early and using regional laydown facilities to marshal cargo at or near a site well before construction begins. These tactics would help developers avoid trailer shortages during peak shipping periods, allow a longer window for finding qualified heavy-haul drivers who are in short supply, and mitigate cost overruns due to driver overtime and late permitting.

### Asia-Pacific Leads the Project Logistics Market

As per the industry sources, Asia-Pacific leads the market. It is also expected to be the fastest-growing market. In recent years, infrastructure investment has been a key driver of economic development for Asia-Pacific countries. Some countries focus on accelerating the development of their domestic infrastructure (such as Australia and the ASEAN countries). China's construction industry has undergone significant transformation in recent years. Since the announcement of the Belt and Road Initiative in 2013, Chinese contractors have undertaken and invested in a vast number of infrastructure projects. According to the China International Contractors Association, in 2017 alone, Chinese contractors concluded 7,217 construction contracts along the Belt and Road and 13,267 construction contracts globally. This increasing construction activity presents a significant opportunity for the regional project cargo companies to provide logistics services to such projects in the coming years.

Some of the regional logistics companies are successfully handling heavy cargo with enhanced capabilities. For instance, Megalift, involved in the transportation of heavy and oversized cargoes, received a contract from General Electric to transport the current largest and most efficient heavy-duty gas turbine in the world. Megalift transported the massive General Electric 9HA.02 gas turbine in Malaysia, which came from France to Pasir Gudang port, located in the southern region of Peninsular Malaysia. Since 2018, Megalift has been moving a large number of shipments for the Track 4A project.

### Project Logistics Market Competitor Analysis

The project logistics market is fragmented, with the presence of global players and small- and medium-sized local players. Most global logistics players have a special project cargo division to meet the market needs and demand. Local players are also increasingly enhancing their capabilities in terms of fleet size, service offerings, industries served, and technology. Global manufacturers are making large and oversized components in the factory sites (off-site), which creates huge complexities for the heavy cargo haulage companies. Global companies with high capital and assets can invest in upgraded fleets and benefit from this scenario. On the other hand, regional and local players are also coming up with better industry solutions to support the clients' needs in executing the projects in the scheduled time.

### Additional Benefits:

The market estimate (ME) sheet in Excel format  
3 months of analyst support

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