

United States Pharmaceutical 3PL Market - Growth, Trends, Covid-19 Impact, and Forecasts (2023 - 2028)

Market Report | 2023-01-23 | 120 pages | Mordor Intelligence

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Report description:

The US pharmaceutical third-party logistics market is expected to expand at a compound annual growth rate (CAGR) of more than 4% during the forecast period.

Due to COVID-19, the pharma supply chain was impacted by distribution challenges created by reduced transportation capacity. Disruptions at ports, quarantined crews, and labor shortages due to lockdowns are all contributing factors. COVID-19 caused the slowdown of the new pharmaceutical product development due to material shortages, disruptions in clinical trials, and backups in FDA approval.

However, the United States is the world's largest market for temperature-sensitive healthcare products such as biopharmaceuticals, vaccines, and clinical trial materials. The rising number of clinical trials employing various temperature-sensitive materials, such as blood samples, tissue samples, and some drugs, have catalyzed the growth of the market. There are many well-established pharmaceutical companies in the United States. The pharmaceutical industry of the United States alone accounts for almost half of the global pharmaceutical market.

Furthermore, the pharmaceutical 3PL industry is bound by strict rules and regulations. For instance, warehouses and shippers of pharmaceuticals in the United States must be registered with the Food and Drug Administration (FDA). There are no exceptions; even if they are planning a short-term or emergency relationship with a 3PL provider, one must make sure they are approved for storing and transporting pharmaceuticals. In addition, government regulations related to the distribution of pharmaceuticals are codified as part of the CGMPs (Current Good Manufacturing Practices), which is the best practice for the health and safety of consumers.

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US Pharmaceutical 3PL Market Trends

The United States is Leading in the Pharmaceutical Market Across the World

Despite the influence of several growing countries, the United States holds a commanding proportion of the global pharmaceutical market. The country is home to some of the world's largest pharmaceutical corporations, and American customers have access to one of the world's most advanced pharmaceutical systems.

In recent years, pharmaceutical sales revenues in the United States have accounted for about half of the global total. In 2020, the United States had five of the top ten pharmaceutical corporations in the world. AbbVie is the new number one pharmaceutical business in the United States, and its best-selling medicine is Humira. Johnson & Johnson is another American corporation that has made a global impact, with its pharmaceutical division producing a record USD 45.6 billion in 2020. Furthermore, in 2021, the United States was leading in pharmaceutical sales, with more than USD 555 billion, with a growth rate of 7.6% compared to 2020. Also, the country had 46.8% of global sales in 2021 (2020: 46.8%, 2019: 46.5%).

In addition, overall pharmaceutical expenditures in the United States increased by 4.9% in 2020 compared to 2019. This rise was driven by increased utilization (a 2.9% increase) and new medications (a 1.8% increase), with price increases having a little impact (a 0.3% increase).

International Trading is Boosting the Market

China has been the leading supplier of medicines in the United States over the last decade, with India and Mexico contending for second and third places, respectively, depending on the year. China, India, and Mexico are the top three pharmaceutical import sources, with Canada, Germany, Italy, the United Kingdom, Israel, Spain, and Ireland filling out the top ten.

In the fiscal year ending March 31, 2021, pharmaceutical exports to India increased by 18.7% to USD 24.44 billion, owing to the increasing demand for the country's generic pharmaceuticals.

Furthermore, in January 2022, export volumes of pharmaceutical goods accounted for more than USD 5.4 billion, with a growth rate of 38% compared to the same month in 2021. Meanwhile, the import volumes slightly declined in 2022 by 6% compared to 2021.

US Pharmaceutical 3PL Market Competitor Analysis

The US pharmaceutical 3PL market is competitive and fragmented with the presence of many international players. Although the market is quite fragmented, the efforts of established firms to attain a considerable share in the target market are estimated to build healthy competition among industry players.

Some of the existing major players in the market include Deutsche Post DHL, FedEx, Kuehne + Nagel International AG, United Parcel Service Inc., C.H. Robinson Worldwide Inc., CEVA Logistics, DB Schenker, Agility Logistics, and Expeditors International of Washington Inc. The pharmaceutical industry is expected to witness more acquisitions and mergers as competition increases. This industry is on the right track for continued growth.

Additional Benefits:

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

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