

Fifth-party Logistics Market Assessment, By Service Offerings [Integrated Logistics Solutions, Supply Chain Management, Technology Integration, Sustainability Solutions, Others], By Customer Type [Business-to-Business (B2B), Business-to-Consumer (B2C), E-commerce, Others], By Industry [Retail, Healthcare, Automotive, Electronics, Food and Beverages, Others], By Region, Opportunities and Forecast, 2017-2031F

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Report description:

Global fifth-party logistics market is projected to witness a CAGR of 6.76% during the forecast period 2024-2031, growing from USD 9.90 billion in 2023 to USD 16.71 billion in 2031. The market has seen rapid growth in recent years due to electronic commerce, raising the need for the supply of efficient logistics solutions that guarantee faster delivery and real-time tracking. The heightened globalization of trade has profoundly changed the dynamics of businesses that need to have more sophisticated means of supply chain management to properly handle the complexities of international logistics. Moreover, companies can improve their operations and reduce costs with new technological advancements in artificial intelligence, the Internet of Things, and big data analytics. Consequently, an emerging focus on sustainability is encouraging businesses to adopt green logistics. Disruptions in the global context put business pressures on vulnerable areas of a traditional logistics system. Customization and flexibility create unique solutions for the varied operational needs of companies. Along with the higher complexity of regulatory environments, there is a need for fifth-party logistics (5PL) providers as businesses require specialized assistance. Integration of services between logistics companies and businesses increases service delivery improvements, while increased urbanization provides new opportunities for effective solutions in last-mile delivery.

Fifth-party logistics is a logistics model that has an intermediary that manages and integrates the entire supply chain on behalf of

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the clients and coordinates multiple third-party logistics providers and other partners. Advancements in technology and data analytics integrate to optimize logistics operations while reducing costs and enhancing the efficiency of businesses. Fifth-party logistics is especially useful to businesses that require end-to-end tailor-made solutions since the logistics of a globalized world cannot always be easy. XPO Inc. is one of the companies providing innovative and sustainable end-to-end logistics solutions in Europe. In 2023, its revenue in the French warehousing business grew by 42% compared with last year. It has a solid warehousing network, which continues to expand its value-added logistics portfolio through 20 sites amounting to 315,000 square meters across France. These upgrades would complement the highly extensive transport offerings that XPO possesses, thus enabling the company to provide comprehensive end-to-end supply chain solutions that meet the emerging needs of its clients.

E-commerce Expansion to Boost Market Growth

One of the primary growth drivers for the fifth-party logistics market is e-commerce expansion, leading to a shift in the dynamics of logistics and increased demand for efficient solutions for supply chain management. With increasing e-commerce, companies need the expertise of a modern logistics operation, hence, they are looking for a fifth-party logistics service provider who can design and manage complex distribution networks and ensure seamless service integration.

In September 2024, Deutsche Post AG, a German package delivery and supply chain management company, and Poste Italiane launched Locker Italia, a joint venture to create a modern and convenient parcel locker network across Italy. The milestone comes after the strategic partnership established last year between DHL Group and Poste Italiane regarding parcel services in the Italian and international markets.

The need for quick and accurate order fulfillment has become crucial as consumers want their goods delivered in real-time with exact tracking and updates at every stage of delivery. In response to these needs, fifth-party logistics service providers have made technology facilitate the optimal use of warehousing assets, streamlined last-mile delivery, and improved efficiencies in supply chains in general. The rise of e-commerce has given impetus to competition, compelling businesses to differentiate themselves through superior logistics performance, leading to the robust growth of the fifth-party logistics market. Companies are increasingly recognizing the value of integrated logistics solutions that can move with an evolving landscape of online retail and meet a set of diverse needs for consumers.

Leveraging Technology to Propel Market Growth

Leveraging technology in logistics remains a significant driver that pushes fifth-party logistics forward as it changes the way logistics operation management and execution are performed. Advanced technologies such as Artificial Intelligence, the Internet of Things, and big data analytics are crucial to enable better operational efficiency and decision-making. Innovations such as real-time tracking of shipments, predictive analytics in terms of demand forecasting, and automated inventory management ensure streamlined processes along with the supply chain. Moreover, cloud-based solutions ensure efficient and effective communication between different stakeholders, hence facilitating greater flexibility and responsiveness to environmental changes.

In July 2024, C.H. Robinson Worldwide Inc., an American transport company, unveiled an advanced load-matching platform set to improve efficiencies for its carriers. The new tool integrates a fresh algorithm that employs data science and artificial intelligence to dig through multiple and varied data while giving the closest and most accurate load recommendations based on a carrier's search history and their posted trucks within Navisphere Carrier. Once there is a suggested available load, carriers send text or email-based real-time and hyper-customer-specific recommendations for smooth communication.

A company can optimize routes, reduce costs, and enhance service levels by embracing advanced software-based logistics management solutions to satisfy higher expectations of consumers at speed and reliability. Technology further enables organizations to attain sustainability objectives as it increases resource efficiency and reduces waste in logistics activities. With this coming into the scenario of challenging logistics issues, comprehensive data-based solutions have become the requirement of businesses looking to gain a competitive advantage in the marketplace and drive long-term growth. Therefore, technological integration becomes essential in the fifth-party logistics model.

Retail Segment to Dominate the Fifth-party Logistics Market Share

Due to the rapid rise in e-commerce and evolving shopper behaviors, the retail sector will be at the forefront of adopting fifth-party logistics. As this approaches, more shoppers will prefer online channels for purchasing goods, and retailers face the critical challenge of meeting the rising expectations for quick, responsive, and transparent delivery services. Amidst this change,

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an advanced logistics solution becomes necessary for managing complex supply chains effectively. Therefore, fifth-party logistics service providers are essential partners in such cases. In November 2023, United Parcel Service of America, Inc. unveiled the UPS Supply Chain Symphony platform that allows several supply chain components, such as shipping, warehousing, and inventory management, under one umbrella. The integrated platform enables UPS customers to manage their supply chains as they get proactive visibility of the upcoming challenges.

The competitiveness in the retail sector forces companies to distinguish themselves through higher logistics performance, which, in turn, fuels demand for fifth-party logistics solutions. With the aid of technology, including data analytics and real-time tracking, fifth-party logistics providers enhance retailers' operations by cutting down costs and developing better customer service. As the retail business continues to evolve further in the future, reliance on advanced logistics solutions will further advance the presence of the retail segment of the global fifth-party logistics market.

Asia-Pacific to Dominate the Fifth-party Logistics Market Share

Asia-Pacific is poised to lead the fifth-party logistics market due to rapid economic growth, urbanization, and a growing middle-class population in the region. The region has experienced a sharp rise in e-commerce activity that significantly increased the demand for efficient logistics solutions and their ability to manage complex supply chains. Also, the Asia-Pacific market is facilitated by major infrastructural investments in transportation networks and warehousing facilities, which make logistics smoother. In addition, different industries such as retail, manufacturing, and technology sectors raise the demand for a more comprehensive kind of solution, such as fifth-party logistics. Hence, the region is expected to grow with great momentum as it climbs in the global landscape of logistics. In June 2024, C.H. Robinson Worldwide Inc. continued to develop its presence in Asia-Pacific with a new office opening in the Philippines, further emphasizing its focus on delivering exceptional, customized services in key markets across the globe.

Future Market Scenario (2024 – 2031F)

□ Increased reliance on artificial intelligence, machine learning, and automation to make processes more efficient and improve the quality of decision-making is expected to drive market growth in the forecast period.

□ Increased focus on environmentally friendly operations is expected so that green technologies and sustainable supply chain solutions become much more integrated among logistics providers.

□ As the trend of e-commerce is rising and affecting consumer behavior, the demand for agile logistics solutions will increase. Retailers will increasingly reach out to fifth-party logistics providers to handle complex fulfillment processes so they can make fast deliveries and increase customer satisfaction.

Key Players Landscape and Outlook

The global fifth-party logistics market is marked by a high level of competition from local and international players. Market-share aspirations among major companies are driven by developing innovative solutions through advanced technologies such as artificial intelligence, the Internet of Things, and analytics toward operational efficiency and effective customer experience. Expansion of geographical reach is key as the players try to tap emerging markets and seize the rising demand for sophisticated logistics services. Increasingly, such penetration is often accomplished through local partnerships and investment in infrastructure. Recent market developments depict a competitive environment as many players develop customized services and solutions, pursuing strategic partnerships where resources are combined through acquisitions or consolidating current market positions. All these strategies can spur growth, improve service offerings, and position 5PL providers at the forefront of logistics development.

In September 2024, Kuehne + Nagel International AG, a Switzerland-based logistics company, opened its new Adidas distribution center in Mantova, Northern Italy. The logistics hub combines growth opportunities, advanced digitalization, and sustainability. This is the largest investment of around USD 375 million that Kuehne + Nagel has ever implemented, and the company is clearly showing how it is committed to more efficient and environment-friendly logistics solutions. Meanwhile, the company will create more than 700 new jobs at technical and digital locations.

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