

Retail Logistics Market Assessment, By Type [Conventional Retail Logistics, E-commerce Retail Logistics], By Solution [Commerce Enablement, Supply Chain Solutions, Reverse Logistics and Liquidation, Transportation Management, Others], By Mode of Transport [Roadways, Railways, Airways and Waterways], By Region, Opportunities and Forecast, 2018-2032F

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Report description:

Global retail logistics market is projected to witness a CAGR of 11.45% during the forecast period 2025-2032, growing from USD 267.83 billion in 2024 to USD 637.53 billion in 2032.

The retail logistics market has grown significantly due to the rapid expansion of electronic commercial transactions, the increasing demand of consumers for faster delivery, and the globalization of supply chains. As online shopping becomes more common, retailers invest in timely distribution and many efficient logistics systems to meet customer expectations. The growth of delivery services on the same day and the next day is an additional growth in combination with the adoption of advanced technologies such as automation, artificial intelligence, and actual monitoring. The growing complexity of global trade has increased the demand for logistics solutions that optimize inventory management and transportation. Urbanization and changing consumer preferences, like the demand for personalized shopping experiences, are also fueling the growing need for sophisticated logistics networks. The shift to omnichannel retail, where businesses integrate online and offline operations, has heightened the importance of seamless logistics to ensure a consistent customer experience. Government investments in infrastructure and the development of sustainable practices like green logistics are additional factors supporting the market growth. As competition in the retail sector intensifies, companies prioritize logistics to improve operational efficiency and gain a competitive advantage, making it a critical component of the retail industry.

In September 2023, FedEx Corporation, a United States-based package delivery and supply chain management company, launched fdx.com, a data-driven platform designed to enhance customer experiences by leveraging FedEx network insights. The

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platform offers tools to grow demand, increase conversion rates, optimize fulfillment, and streamline returns. Key features include ShopRunner for boosting demand, Predictive Delivery Estimates (PDE) for precise delivery times, and Sustainability Insights for environmental impact. The fdx platform, customizable for various business needs, integrates digital and physical networks to provide a seamless customer journey. This innovation helps drive growth in the retail logistics market by enhancing operational efficiency, meeting consumer demand for faster deliveries, and supporting sustainable practices, thus providing a competitive edge for retailers.

E-commerce Expansion Drive Market Growth

The expansion of e-commerce has significantly increased the need for efficient and timely delivery services, which serve as a major driver for the growth of the retail logistics market. The growing popularity of online shopping has led consumers to demand faster delivery options, such as same-day or next-day delivery, prompting retailers to invest in advanced logistics solutions. This includes an automated warehouse, AI route optimization, and the actual monitoring system to enhance customer expectations and compliance. Furthermore, the growth of cross-check transactions has enhanced the need for global supply chain management and further increased demand for logistics. The convenience of online shopping has also led to increased order volumes forcing retailers to streamline inventory management and transportation processes driving the growth of the retail logistics market.

In September 2023, DSV A/S, a Denmark-based global transport and logistics company began constructing its largest and most sustainable warehouse facility in Singapore, DSV Pearl. Spanning 66,000 sqm, this five-storey advanced warehouse features state-of-the-art automation systems, spiral conveyors, and a high ceiling for efficient storage and retrieval. Strategically located near major transportation hubs, it caters to the growing demand for innovative warehousing solutions in Asia with green credentials like LEED Gold and BCA Green Mark Platinum and features such as solar panels and EV chargers, DSV Pearl exemplifies environmental stewardship. This facility will drive the retail logistics market by enhancing operational efficiency, meeting e-commerce demands, and promoting sustainable practices, ultimately supporting regional economic growth.

Omnichannel Retail Fueling the Retail Logistics Market Growth

Omnichannel retail is driving the growth of the retail logistics market by integrating online and offline sales channels requiring seamless logistics operations. Consumers expect a unified shopping experience whether they purchase online in-store or via a mobile app, creating the need for complex supply chain networks. Retailers need to effectively manage inventory across multiple platforms, provide real-time visibility and offer flexible delivery options like buy online, pick up in store, home delivery, etc. This complexity is driving increased investments in advanced logistics technologies like warehouse automation and data analytics to streamline operations. In addition, the omni-channel strategy requires faster and more accurate decisions to provide the last kilometer to develop logistics innovation. Retailers are continuing to increase in demand for reliable and effective logistics systems, focusing on improving customer satisfaction due to transparent integration.

In December 2023, Universal City Studios LLC, a United States-based media and entertainment conglomerate owned by NBC Universal and Nippon Express Holdings, announced a corporate marketing partnership to enhance the shopping experience at the park's retail stores with EC and logistics solutions. This partnership aims to improve retail operations and revamp the park's online store in spring 2024. Nippon Express Holdings, a global logistics company known for its innovative solutions, will sponsor a venue within the theme park and provide advanced logistics services. This collaboration supports the growth of the retail logistics market by integrating digital and physical retail channels and enhancing customer satisfaction through streamlined logistics and e-commerce capabilities.

Dominance of Conventional Retail

The conventional retail logistics segment dominates the market due to its critical role in supporting brick-and-mortar stores, which remain a significant part of global retail. This dominance is driven by consumers who prefer in-store purchases for immediate product availability, the ability to inspect items physically, and the instant gratification of taking items home. Additionally, traditional logistics operations support large-scale distribution networks, supplying retail stores efficiently with inventory management and last-mile delivery tailored to physical outlets. This segment benefits from steady demand in regions where digital penetration is limited, ensuring its continued relevance despite the rise of e-commerce.

In December 2023, C.H. Robinson Worldwide, Inc., a United States-based logistics company, enhanced real-time visibility for retailers' freight with its advanced predictive ETA technology, especially crucial for the holiday season. By leveraging its digital carrier network, data on 3 million shipping lanes, and historical data from 20 million shipments annually, C.H. Robinson achieves

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high accuracy in predicting delivery times. This precision helps retailers manage inventory more effectively, reduce over-ordering and respond promptly to changing demands, thus supporting streamlined operations and cost savings. This innovation boosts the retail logistics market by improving supply chain efficiency, meeting consumer expectations for timely deliveries and optimizing inventory management in a challenging economic environment.

North America Dominates Retail Logistics Market Share

North America dominates the retail logistics market due to its established infrastructure, technological advancements, and high consumer demand. The region benefits from an extensive road, rail, and port network that enables efficient transportation and distribution. Leading companies like Amazon, Walmart, UPS, and FedEx invest heavily in automation, AI, IoT, and other logistics innovations to optimize supply chain operations and improve last-mile delivery. High consumer purchasing power and rapid growth in e-commerce further drive the need for advanced logistics solutions. In addition, state support enhances the effectiveness of operations thanks to the policy and investment in transportation infrastructure. The role of a North American commercial environment and a global trade center that is advantageous for companies enhances leadership in the retail logistics market.

In October 2024 J.B. Hunt Transport Services, Inc., a United States-based transportation and logistics company and UP.Labs announced the creation of the Logistics Venture Lab to launch AI-enabled startups focused on solving core industry challenges within logistics and freight. The lab aims to launch six startups over the next three years, targeting areas such as brokerage, dedicated services, intermodal, and truckload. This collaboration will leverage big data, generative AI, and emerging technologies to drive efficiency and innovation in the transportation industry. By fostering these startups, LVL will enhance the retail logistics market by improving operational efficiency, addressing supply chain challenges and accelerating technological advancements to meet evolving consumer demands.

Future Market Scenario (2025 – 2032F)

- Adoption of advanced technologies like AI and robotics will streamline operations, reduce costs and improve efficiency.
- Growing emphasis on eco-friendly practices, including green logistics and sustainable packaging to meet consumer and regulatory demands.
- Enhanced integration of online and offline channels to provide seamless customer experiences and efficient inventory management.
- Expansion of logistics networks to cater to emerging markets and support global trade driven by e-commerce growth and changing consumer preferences.

Key Players Landscape and Outlook

Retail logistics companies pursue various strategies to remain competitive in a rapidly changing market. They are increasingly adopting advanced technologies such as automation, robotics, and artificial intelligence to streamline operations, boost efficiency, and enhance the customer experience. Companies are expanding their infrastructures by investing in larger, strategically located warehouses and adopting sustainable practices like green logistics to align with environmental goals. Additionally, most focus on omnichannel solutions facilitating seamless online and offline channels, making services such as BOPIS possible. For the rising tide of e-commerce, companies are looking to develop the last mile in their delivery networks, improving speed and flexibility through same-day and next-day delivery options. In this light, strategic alliances, mergers, and acquisitions are very important, where UPS bought logistics companies for reverse logistics and time-sensitive delivery capabilities. In addition, companies will focus on data-driven insights by IoT and blockchain to develop supply chain visibility and responsiveness. Further efforts to personalize the customer experience, make return processes easier, and cost-cutting ensure market relevance.

In February 2024, C.H. Robinson Worldwide, Inc., a United States-based logistics company, introduced new technology for automating appointment scheduling in freight shipping, a task performed over 1 billion times annually in the U.S. This touchless system uses AI to optimize appointments based on data from millions of shipments, allowing for 24/7 scheduling without manual intervention. This innovation saves shippers time, accelerates freight movement, and reduces costs by avoiding premium charges and fines. By enhancing supply chain efficiency and providing real-time visibility, this technology supports the growth of the retail logistics market, meeting the industry's demand for greater automation and operational efficiency.

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