SCOTTS INTERNATIONAL

China Third-Party Logistics (3PL) - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)

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Report description:

The China Third-Party Logistics Market size is estimated at USD 303.37 billion in 2025, and is expected to reach USD 414.28 billion by 2030, at a CAGR of greater than 6.43% during the forecast period (2025-2030).

Key Highlights
- The Chinese third-party logistics market is mainly driven by the rise in e-commerce activities and rising disposable income.
- China's e-commerce market is reshaping the nation's economic landscape. The digital economy is becoming ever more crucial in propelling China's GDP. In 2023, online purchases accounted for more than a quarter of China's consumer goods sales, outpacing the global average. Additionally, with its extensive workforce, e-commerce stands out as a major employment engine in the country.
- In the first half of 2024, China's e-commerce sector experienced significant growth, bolstering the momentum for consumption recovery in the world's second-largest economy. During this period, online retail sales jumped 9.8 percent year-on-year, totaling 7.1 trillion yuan (approximately USD 996 billion). Of this, retail sales of goods accounted for CNY 5.96 trillion, reflecting an 8.8 percent increase, as per data released by the Ministry of Commerce (MOC).
- Chinese e-commerce giants Alibaba and JD.com reported robust sales during the 2024 "Double 11" shopping festival, underscoring the steady recovery of China's consumer market.
- Alibaba Group's platforms, Taobao and Tmall, announced a notable surge in sales during the 'Double 11' event. A total of 589 brands surpassed the CNY 100 million sales mark, marking a 46.5 percent uptick from 2023. The company highlighted that consumer engagement reached an unprecedented peak in 2024.
- Beijing-based JD.com revealed that its live-streaming sales had skyrocketed, boasting a 3.8-fold increase from 2023. Over 17,000 brands celebrated sales growth exceeding five times. Taobao and Tmall's growth spanned various sectors, notably in home appliances and decoration. This momentum propelled over 139 brands past the 100-million-yuan sales milestone, with

9,600 brands experiencing a sales doubling from 2023. Hence, as e-commerce sales surge rapidly, the demand for 3PL logistics in the country is rising in tandem.

China Third-Party Logistics (3PL) Market Trends

Value-added warehousing and distribution experiencing substantial growth

- As China embraces the Industry 4.0 era, its manufacturing sector remains a key catalyst for logistics growth. The surge of high-tech manufacturers is driving a notable uptick in demand for Grade A warehouses.
- Highlighting this trend, solar cell production has seen a remarkable growth rate of 54.2%, while New Energy Vehicles (NEVs) have surged by 30.4%. According to the China Passenger Car Association (CPCA), NEV penetration in China hit 36.2% in 2023, leading many brands to either set up or expand their manufacturing bases.
- Leasing trends differ across regions: Southern China's light manufacturing firms are emphasizing flexibility in their warehouse operations. In Eastern China, a leader in the nation's shift towards a low-carbon economy, a flurry of eco-friendly warehouses boasting LEED certifications are springing up. On the other hand, Western China's rapid NEV growth is bolstering a steady demand for warehouse leases.
- In 2023, the stock of non-bonded Grade A warehouses in 31 major cities exceeded 90 million sqm. Eastern China emerged as a dominant player, representing over a third of the nation's total stock. As supply consistently flowed in recent years, some developers resorted to rental trade-offs to mitigate rising vacancy rates.
- Northern China, especially in cities like Langfang, Tianjin, and Beijing, saw a surge in new supply beginning in 2021. Conversely, Western China has been gradually slowing down since 2020, allowing it to absorb its vacant stock.
- Southern China reached a supply zenith, particularly in Guangzhou and Dongguan, spurred by strong demand from cross-border e-commerce. Meanwhile, Central China maintained steady demand for transportation and consumption, yet still grappled with vacancy pressures due to the influx of supply over the last three years. This underscores a pronounced demand for warehousing spaces across the industry.

Surge in e-commerce activities driving the market

- China's e-commerce market has ushered in a transformative era for the nation's economy. Today, the digital economy plays an increasingly pivotal role in bolstering China's GDP. In 2023, over a quarter of China's consumer goods were purchased online, significantly surpassing the global average. Moreover, e-commerce is a key driver of employment in the country, thanks to its vast workforce.
- For the past decade, China has led the e-commerce charge, outstripping the U.S. by over USD 486 billion in revenue. Currently, China boasts the world's largest population of digital buyers. Recent years have seen the integration of features like live streaming and swift delivery into China's e-commerce realm, further enriching the customer experience.
- With the rapid digitalization permeating every facet of life, a growing number of Chinese businesses are transitioning online. Bolstered by its vast manufacturing sector and governmental backing, China proudly hosts the globe's largest B2B e-commerce market. Yet, while the online retail sector flourishes, B2B e-commerce growth has recently decelerated. Cross-border transactions have emerged as a vital segment of China's B2B landscape, predominantly leaning towards exports, with the U.S. standing out as the primary destination for Chinese B2B goods.
- China, home to some of the world's largest e-retailers, has seen consistent growth in e-commerce sales. Rapid internet adoption has propelled online shopping penetration to over 80%. With the surge in mobile device usage, shopping via smartphones and tablets has become commonplace. The pandemic-induced social restrictions and lockdowns accelerated the rise of

online-to-offline ventures, including quick commerce, online food delivery, and community group-buying. AI advancements are reshaping e-retail, optimizing operations and customer interactions. Furthermore, the adoption of augmented reality (AR) and virtual reality (VR) technologies is enriching shopping experiences, leading to heightened customer satisfaction and boosted sales.

China Third-Party Logistics (3PL) Industry Overview

The China third-party logistics (3PL) market is highly fragmented with a lot of local, regional, and global players. Some of the major players include Ceva Logistics, Sinotrans, DHL Supply Chain, XPO Logistics, SF Expres etc.

Companies are getting more competitive to capitalize on the enormous possibility. As a result, international firms are making strategic investments to build a regional logistics network, such as new distribution centers, smart warehouses, and so on.

Additional Benefits:

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

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