

Automotive Logistics - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)

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Report description:

Automotive Logistics Market Analysis

The Global Automotive Logistics Market size is estimated at USD 282.90 billion in 2025, and is expected to reach USD 368.20 billion by 2030, at a CAGR of 5.41% during the forecast period (2025-2030).

Continued electrification of passenger and commercial fleets, the rapid digitalization of aftermarket fulfillment, and the spread of mobility-as-a-service programs are expanding contract scope and shipment complexity for logistics providers. Modal shifts from road to rail and sea are accelerating as corporate sustainability targets tighten, while mergers among global 3PLs are creating scale advantages that reshape competitive dynamics. At the same time, same-day and next-day delivery expectations in e-commerce are pushing automation investments in micro-fulfillment, and integrated visibility platforms are becoming a prerequisite for winning long-term automotive contracts.

Global Automotive Logistics Market Trends and Insights

Acceleration of Battery-Electric Vehicle Adoption Raising Finished-Vehicle Flows

Global electric vehicle penetration is forecast to top 20% in 2025, driving demand for specialized battery supply chains and new finished-vehicle corridors. DHL has opened EV Centers of Excellence in Asia-Pacific and Europe, providing temperature-controlled storage, DG-compliant handling, and multimodal outbound solutions. Maersk's EV Battery Flex Flow program halves warehouse

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footprints by using reusable containers and advanced fire-suppression, cutting logistics costs by 30% for cell manufacturers. Western 3PLs are also investing in Chinese corridor capacity as the country maintains 70% cathode and 85% anode output, making near-shoring of buffer stocks crucial for European and North American OEMs. The capital intensity of battery handling depots is prompting joint ventures between carriers and energy firms to pool infrastructure spending.

E-commerce Boom in Aftermarket Parts Creating Same-Day/Next-Day Delivery Expectations

Online parts revenue now accounts for double-digit share of global aftermarket sales, prompting a shift from regional distribution centers to micro-fulfillment nodes closer to urban drivers. AutoStore deployments at leading spare-parts distributors raise storage density by 300% and deliver 99.6% uptime, enabling two-hour cut-off times for 30,000 SKU assortments. Kia Israel's hardware-less tracking reduced vehicle search time from hours to minutes, freeing 50% of labor and trimming processing time by up to 40%. Logistics providers now bundle predictive inventory tools with last-mile networks to secure long-term contracts, while suburban cross-docks replenish rural routes overnight to meet weekend service guarantees.

Macroeconomic Uncertainty Suppressing Discretionary Vehicle Purchases and Shipments

Global automotive output slowed to 0.8% growth in 2024 on tighter credit and weak consumer sentiment, reducing finished-vehicle port throughput by 9.4% in Europe. Ford is testing rail-short-sea alternatives from Mexico's Guaymas port to cut costs while maintaining lead-times under demand volatility. Lower utilization presses margins at ro-ro terminals, yet operators must retain surge capacity for recovery, straining pricing discipline. Chinese EV exports add forecasting complexity, as new brands scale output regardless of Western macrocycles.

Other drivers and restraints analyzed in the detailed report include:

Growth of Vehicle Subscription & Mobility-as-a-Service Increasing Fleet Turnover Logistics / Consumer Demand for End-to-End Shipment Visibility Fostering Platform-Enabled 3PL Contracts / Freight-Rate Volatility Eroding Budget Predictability for Automotive Shippers /

For complete list of drivers and restraints, kindly check the Table Of Contents.

Segment Analysis

Transportation retained 58.8% share of the global automotive logistics market in 2024. Road haulage remains pivotal, yet rail and sea volumes are rising as shippers seek lower-carbon options. BMW's hydrogen trucks on German lanes lower tank-to-wheel emissions and illustrate modal innovation. Value-added services are forecast to outpace with a 7.2% CAGR, buoyed by customization, software flashing, and pre-delivery inspection demands. Providers are converting brown-field warehouses into multi-client assembly hubs that embed robotics, enabling shorter program launches without legacy overhead.

Automation reshapes storage economics: AutoStore's goods-to-person systems triple cubic utilization and cut pick errors below 0.1%, supporting two-hour aftermarket order windows. As OEMs migrate to modular EV platforms, sub-assembly kitting and battery-pack sequencing generate new margin pools for service specialists. The balance of contract revenue is therefore tilting from line-haul to high-touch add-ons, diversifying provider income and reinforcing sticky multiyear agreements.

OEM logistics accounted for 73.1% of the global automotive logistics market size in 2024, driven by complex inbound component flows and finished-vehicle exports. Electrification increases capital expenditure on ADR-compliant battery depots, temperature-controlled trailers, and emergency response protocols. Tesla's long-term charter with Hyundai Glovis to ship Model 3 from Shanghai to Rotterdam reflects new transcontinental EV corridors.

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Aftermarket logistics is growing faster at 6.5% CAGR, underpinned by rising vehicle age and direct-to-consumer parts sales. DHL's purchase of Inmar Supply Chain adds 14 return centers, positioning the company to capture escalating reverse-logistics volumes in North America dhl.com. Latin American fleets averaging 18-20 years heighten regional demand for import parts, attracting 3PL investment in bonded free-trade hubs that bypass port congestion.

The Automotive Logistics Market is Segmented by Service (Transportation, Warehousing, Distribution & Inventory Management and More), by Type (OEM and Aftermarket), by Cargo Type (Finished Vehicles, Auto Components, and More), by Delivery Time (Standard and Express / Critical), and by Geography (North America, South America, Asia-Pacific, Europe, Middle East and Africa). The Market Forecasts are Provided in Terms of Value (USD).

Geography Analysis

Asia-Pacific held 47.8% share of the global automotive logistics market in 2024 and is forecast to grow at 6.8% CAGR to 2030. China's dominance in EV output and battery material refining sustains high intra-regional lane density, while India's production-linked incentives attract component manufacturing migrations. DHL added an EV Centre of Excellence in Australia in 2025, expanding its regional network for temperature-controlled battery flows. Japanese providers pioneer autonomous platooning on expressways, addressing driver shortages and lifting asset utilization. Major port operators are enlarging ro-ro berths, evidenced by Kaohsiung's 370,000-TEU expansion that boosts vessel turnaround for finished vehicles.

North America remains a strategic hub, but tariff hikes on imported vehicles and components are pressuring routing decisions. Analysts estimate potential reductions of 20,000 units per day if tariffs hold through 2026, compelling OEMs to deepen Mexico and Canada near-shoring. Georgia Ports will invest USD 262 million to upgrade Colonel's Island, targeting top position in U.S. ro-ro throughput by 2026. Alternative Pacific gate entries such as Guaymas are under trial to limit west-coast congestion and balance drayage costs.

Europe grapples with geopolitical disruptions and stringent carbon regulation. Throughput at finished-vehicle terminals fell 9.4% in 2024, shifting the region to net-importer status as Asian EV exports surge. Yet the bloc leads in green logistics mandates: Audi deploys renewable-powered trains for battery modules, shaving 2,600 tonnes of annual CO₂. Peel Ports' GBP 30 million ro-ro berth at Sheerness, operational in 2025, underscores continued investment despite softer volumes.

List of Companies Covered in this Report:

DHL Group / Kuehne + Nagel International AG / CEVA Logistics / DSV A/S / Hellmann Worldwide Logistics SE & Co. KG / BLG Logistics Group AG & Co. KG / Kerry Logistics Network Ltd / APL Logistics Ltd / Ryder System Inc. / Penske Logistics Inc. / XPO Logistics Inc. / Expeditors International / TIBA Group / CFR Rinkens / NYK Line (Auto Logistics Division) / SNCF Geodis / Wallenius Wilhelmsen Logistics / UPS Supply Chain Solutions / Maersk Logistics & Services / Nippon Express Holdings / CJ Logistics* /

Additional Benefits:

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

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