FMCG Logistics - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2026 - 2031)

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Report description:

FMCG Logistics Market Analysis

The FMCG Logistics Market is expected to grow from USD 1.37 trillion in 2025 to USD 1.44 trillion in 2026 and is forecast to reach USD 1.84 trillion by 2031 at 5.03% CAGR over 2026-2031.

Robust e-commerce uptake, rapid urbanization, and rising middle-class consumption are reshaping distribution models, pushing companies toward technology-enabled, sustainability-minded supply chains that deliver end-to-end visibility and faster fulfillment. Transportation services continue to dominate value creation, while value-added offerings such as co-packing and labeling gain momentum as brands seek customization closer to demand. Cold-chain build-outs unlock growth in frozen and healthcare categories, and digital visibility platforms foster predictive decision-making that lowers waste and stockouts. Intensifying competition and recent megamergers encourage scale economies even as regional specialists retain an edge in localized, last-mile agility within the FMCG logistics market.

Global FMCG Logistics Market Trends and Insights

E-commerce Acceleration and Last-Mile Expectations

Faster online growth compresses delivery windows and fragments order profiles, forcing the FMCG logistics market to pivot toward urban micro-fulfillment and same-day drops. Brazil's FMCG online sales rose 13.6% in H1 2024, with health & beauty up 17.8%

and food up 26.2%. Providers are staging inventory in forward hubs, layering in electric vans, and rolling out real-time tracking to satisfy consumers who now expect precision and sustainability together. Investment flows into route-optimization platforms and reverse-logistics capabilities that help balance bulk B2B replenishment with escalating direct-to-consumer volumes. These shifts embed competitive stakes for asset-light brands that rely on partners for last-mile excellence within the FMCG logistics market.

3PL / Contract-Logistics Penetration in FMCG

Brands increasingly convert fixed logistics costs to variable spend by outsourcing to 3PLs, unlocking scale and specialized expertise across multiple geographies. McLane's 2025 agreement with Circle K illustrates the appeal of integrated transportation and distribution solutions that bundle inventory visibility and fleet optimization. Contract logistics players differentiate through co-packing, promotional bundling, and omnichannel returns, creating sticky, multi-year relationships. The model relieves FMCG firms from capital commitments while ensuring rapid deployment of automation, compliance systems, and analytics an arrangement that accelerates the FMCG logistics market evolution toward service-rich ecosystems.

Fuel-Price Volatility

Diesel cost swings weigh on transport budgets, with fuel accounting for roughly 25% of trucking operating expenses worldwide. Surcharge formulas and hedging contracts cushion some exposure, yet timing gaps often spark rate tensions between carriers and FMCG shippers. Currency shifts complicate cost calculations on cross-border lanes, prompting greater adoption of route-optimization software, alternative fuels such as LNG, and network redesigns that slash empty miles. Price unpredictability therefore tempers investment appetites and erodes margins across the FMCG logistics market.

Other drivers and restraints analyzed in the detailed report include:

Cold-Chain Network Build-OutEnd-to-End Digital Visibility PlatformsCross-Border Regulatory Complexity

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

Segment Analysis

Transportation generated 66.35% of 2025 revenue, underscoring its foundational role in moving high-turnover goods through sprawling distribution webs. Road freight anchors the network, bridging manufacturing hubs, regional DCs, and last-mile nodes, while sea and rail support bulk intercontinental moves. Competitive differentiation now hinges on multi-modal integration, sustainable fleet upgrades, and data-rich route planning that trims transit variance. Value-added services, though smaller, expand at a 4.74% CAGR as brands seek co-packing, labeling, and kitting near demand centers to shrink lead times and marketing risks. This blend of core haulage with tailored services positions providers to capture greater share of the FMCG logistics market.

Intensifying omnichannel activity propels order-profile complexity, boosting needs for postponed configuration and returns management. Investments in automated sortation, collaborative robots, and quality-assurance cells inside warehouses translate into faster throughput and reduced mismatch errors. Providers capable of bundling transport, storage, and customization in a single contract deepen stickiness while growing wallet share. Consequently, the transportation segment remains the backbone, but high-margin growth tilts toward service layers that raise customer intimacy and lock in long-term demand within the FMCG logistics market.

Ambient networks retained 63.40% of 2025 value, reflecting the dominance of dry groceries, household goods, and personal-care items that travel safely at standard temperatures. Scale efficiencies stem from uniform handling protocols and high cube utilization, allowing dense route planning and lower unit costs. Operators prioritize inventory rotation algorithms and contamination controls to preserve product integrity across high-velocity SKUs. Parallel infrastructure upgrades in racking design and real-time condition monitoring drive uptime gains and shrink waste.

Conversely, frozen logistics logs a 4.45% CAGR to 2031, riding consumer appetite for convenience foods and API-based pharmaceuticals requiring sub-zero transit. Investment pours into high-bay freezers, automated pallet shuttles, and telematics-equipped reefers that maintain <-18 C thresholds door-to-door. Energy-efficient refrigerants and renewable-powered facilities help offset operating costs and meet ESG targets. Chilled and ultra-low categories sustain niche demand for dairy, fresh produce, and biologics, respectively, reinforcing a tiered service mix that broadens provider revenue channels across the FMCG logistics market.

The FMCG Logistics Market Report is Segmented by Service (Transportation, Warehousing & Distribution, Value-Added Services), Temperature Control (Chilled, Frozen, and More), Product Category (Food & Beverage, Personal Care, and More), Distribution Channel (Online, Offline), and 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 generated 36.20% of 2025 global revenue and sustains the fastest regional momentum at a 4.63% CAGR to 2031. Rapid urbanization, burgeoning middle classes, and digital payment ubiquity accelerate demand for modern trade and e-commerce alike. High-speed rail corridors, port expansions, and highway upgrades cut transit times and reduce logistics costs, propelling investment inflows. Nestle Malaysia's USD 56 million Port Klang hub underscores the wave of brownfield and greenfield capacity designed to serve regional exports and domestic distribution simultaneously.

North America combines advanced infrastructure with early adoption of digital visibility tools and sustainability pilots. LNG-powered truck deployments such as GreenLine's fleet for Mondelez India mirror similar carbon-cutting initiatives across U.S. and Canadian lanes. Europe's regulatory environment, led by CBAM and circular-economy directives, nudges providers toward low-emission fleet renewals and warehouse electrification. Dense cross-border traffic demands impeccable documentation and real-time customs integration to avert post-Brexit congestion and emerging sanctions complexities.

South America's rising online propensity, evidenced by Brazil's USD 28.66 billion H1 2024 e-commerce haul, drives demand for bonded warehouses and last-mile crowdsourced fleets that bypass congested urban arterials. Meanwhile, Middle East & Africa witness incremental but steady capacity additions tied to free-trade zones, airport-centric logistics parks, and donor-funded cold-chain corridors supporting fresh produce and vaccines. Collectively, geographic diversification mitigates exposure to any single economic cycle, but service models must flex to local infrastructure gaps and regulatory heterogeneity to thrive in the FMCG logistics market.

List of Companies Covered in this Report:

DHL Group Kuehne + Nagel DSV C.H. Robinson Ceva Logistics XPO Logistics Rhenus Logistics FM Logistic Hellmann Worldwide Logistics Penske Logistics Kenco Logistics JD Logistics FedEx Supply Chain Nippon Express Yusen Logistics Geodis GXO Logistics Savino Del Bene ID Logistics Group Brimich Logistics

Additional Benefits:

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

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