

# Biopharmaceutical Third-Party Logistics Market to Reach USD 271.76 Billion by 2034 | Reports and Data

*The biopharmaceutical third-party logistics market is growing steadily, driven by rising demand for cold chain solutions, biologics, and personalized medicine.*

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/EINPresswire.com/ -- The global

[Biopharmaceutical Third-Party](#)

[Logistics \(3PL\) Market](#) is set for strong growth over the next decade, expanding from USD 143.42 billion in 2024 to USD 271.76 billion by 2034, at a steady CAGR of 6.60%. This growth is fueled by rising demand for temperature-sensitive pharmaceuticals, increasing adoption of personalized medicine, and continued expansion of the biopharma industry, particularly in emerging markets.



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## Market Drivers

The biggest force behind this market surge is the growing need for cold chain logistics to safely transport biologics, vaccines, and other sensitive drugs. According to the International Air Transport Association (IATA), the global demand for temperature-sensitive pharmaceuticals is rising by 10% annually, highlighting the need for specialized logistics. Governments are also stepping in—such as the U.S. Department of Health's USD 2 billion investment to strengthen vaccine distribution networks and new guidelines from the European Medicines Agency to ensure safe handling.

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At the same time, the approval of new biologics and therapies continues to climb. In 2023, the FDA approved 48 new biologics, up 20% from the previous year. This surge in biologics and personalized therapies is creating new opportunities for logistics providers who can handle complex supply chain demands.

Technology is also playing a critical role. Major players like DHL Supply Chain, UPS Healthcare, and FedEx are investing in IoT-enabled temperature monitoring and AI-driven predictive tools to improve efficiency, reduce costs, and provide real-time visibility for shipments. FedEx, for instance, launched a new cold chain service in 2024, securing 15% market share within a year.

## Market Challenges

Despite strong growth, the industry faces hurdles. High operational costs—especially for cold chain infrastructure—are a significant challenge, with logistics providers spending around 20% of annual budgets on temperature control systems. Compliance with international regulations such as Good Distribution Practice (GDP) and Drug Supply Chain Security Act (DSCSA) also raises costs and complexity.

According to the World Health Organization, 25% of vaccines are lost each year due to poor temperature control, making compliance and technology investment critical. Smaller firms, in particular, struggle with the costs of meeting strict regulatory requirements. Additionally, data management issues, such as lack of standardized sharing protocols, remain a barrier to efficiency.

## Regional Insights

North America leads the market, supported by advanced healthcare infrastructure, strong regulations, and government funding for cold chain improvements.

Asia-Pacific is the fastest-growing region, thanks to rapid infrastructure investment, rising pharmaceutical production, and increased clinical trials in markets like China and India.

Europe continues to strengthen its logistics ecosystem through regulatory reforms and sustainability initiatives, with the EU Green Deal pushing providers toward greener, carbon-neutral logistics.

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## Segment Overview

### By Product Type:

Cold Chain Logistics dominates, expected to grow from USD 85 billion in 2024 to USD 160 billion by 2034 (CAGR 6.8%).

Non-Cold Chain Logistics also grows steadily, supporting wider pharmaceutical distribution.

## By Application:

Biologics hold the largest share, growing from USD 50 billion in 2024 to USD 95 billion by 2034.

Personalized Medicine is the fastest-growing, with a CAGR of 7.2%, driven by genomic research and individualized treatments.

Clinical Trials logistics are expanding as global research activities intensify.

## By End User:

Pharmaceutical Companies remain the largest customers, spending USD 60 billion in 2024, expected to reach USD 110 billion by 2034.

Biopharmaceutical Companies are the fastest-growing group, with a CAGR of 7.0%, fueled by innovation in biologics.

Contract Research Organizations (CROs) are also increasing their reliance on 3PL providers for clinical trial logistics.

## By Technology:

IoT-Enabled Logistics is the largest, reaching USD 75 billion by 2034.

AI-Driven Logistics grows fastest at 7.5% CAGR, reflecting automation and predictive analytics adoption.

Blockchain is emerging as a solution for secure and transparent supply chains.

## By Distribution Channel:

Air Freight leads with USD 70 billion in 2024, growing to USD 130 billion by 2034.

Sea Freight grows fastest at 7.0% CAGR, driven by cost-effective trade routes.

Road Freight continues to expand, particularly for last-mile delivery services.

## Biopharmaceutical Third Party Logistics Competitive Strategies & Notable Developments

### Top 10 Companies

#### □ DHL Supply Chain

- UPS Healthcare
- FedEx
- Kuehne + Nagel
- DB Schenker
- DSV Panalpina
- SF Express
- Nippon Express
- Kerry Logistics
- Agility Logistics

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## Strategy

Top players in the Biopharmaceutical Third-Party Logistics Market are competing through vertical integration, strategic partnerships, and innovation. Companies like DHL Supply Chain and UPS Healthcare are focusing on SaaS solutions and bundling services to enhance customer value. Mergers and acquisitions are also a key strategy, with DSV Panalpina acquiring Panalpina to expand its global footprint. Partnerships with technology providers, such as FedEx's collaboration with IoT companies, are enhancing logistics efficiency and transparency. Innovation benchmarks include patent filings for cold chain technologies, with DHL Supply Chain filing 1,200 patents in 2024.

## Biopharmaceutical Third Party Logistics Market Segmentation

### By Product Type

#### Cold Chain Logistics

#### Non-Cold Chain Logistics

### By Application

Vaccines

Biologics

Personalized Medicine

Clinical Trials

By End User

Pharmaceutical Companies

Biopharmaceutical Companies

Contract Research Organizations (CROs)

By Technology

IoT-Enabled Logistics

AI-Driven Logistics

Blockchain in Logistics

By Distribution Channel

Air Freight

Sea Freight

Road Freight

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