

Armstrong & Associates Releases Convergence: Trends in 3PL/Customer Relationships – 2026

New report tracks a 3PL market approaching \$1.3 trillion in 2025, with Technology, Retailing, and Healthcare leading the pack

BROOKFIELD, WI, UNITED STATES, April 28, 2026 /EINPresswire.com/ -- Armstrong & Associates, Inc. (A&A), the leading source of third-party logistics (3PL) market research and consulting, today released "Convergence: Trends in 3PL/Customer Relationships – 2026", a new deep-dive into how and why large enterprises outsource logistics.

The title reflects the defining dynamic of the current 3PL market: a convergence of forces reshaping the industry simultaneously. Growth drivers are converging as AI and cloud infrastructure, e-commerce fulfillment, and cold-chain biologics all accelerate demand at once. Customer-provider relationships are converging as multinational shippers consolidate their 3PL bases toward fewer, more integrated partners. And the lines between traditional 3PLs, digital freight brokers, and technology platforms are blurring into a single integrated supply chain category.

The new report, drawing on A&A's proprietary database of 8,404 3PL customer relationships across 46 countries and nearly 22,000 individual services, examines a global 3PL market that reached an estimated \$1.3 trillion in 2025 and is projected to approach \$1.4 trillion in 2026.

Key findings include:

- Near-saturation of 3PL adoption among large U.S. companies. 94% of Domestic Fortune 500 companies now work with at least one 3PL, up from just 46% in 2001. U.S. 3PL revenues are projected to reach \$323.4 billion in 2025.



Trends in 3PL/Customer Relationships
2026

□ Technology, Retailing, and Healthcare lead vertical industry growth. From 2016 to 2026E, these three vertical industries posted the highest CAGRs at 8.7%, 7.9%, and 7.7% respectively, driven by the AI and cloud buildout, e-commerce-fueled fulfillment, and sustained expansion of cold-chain biologics logistics.

□ Supplier consolidation favors the top tier. Approximately 18 Global Supply Chain Managers (GSCMs) now possess the network scale to deliver integrated, cross-border solutions, positioning them to capture a disproportionate share of future growth as shippers rationalize their 3PL bases.

□ Digital freight brokers reshape the middle. Technology-forward intermediaries such as Arrive Logistics and RXO continue to pressure traditional brokerage models by trading margin for productivity and scale.

□ Volkswagen, Walmart, and Nestlé lead 3PL usage. Volkswagen works with 74 distinct 3PLs, Walmart with 72, and Nestlé with 67, reflecting the logistical complexity of global consumer and industrial supply chains.

About the report

"Convergence: Trends in 3PL/Customer Relationships – 2026" covers value-added services, 3PL revenue by vertical industry and region, services and relationships analysis, lead and strategic relationships, and regional deep-dives for North America, Europe, Asia Pacific, and Central/South America. The report is available at the A&A's website.

About Armstrong & Associates, Inc.

Armstrong & Associates, Inc. is the internationally recognized leading source of 3PL market research, consulting, and M&A advisory services. Since 1980, A&A has provided insight to Fortune 500 shippers, 3PL providers, investors, and policymakers through its proprietary research database, the Who's Who in Logistics Online Guide (889 provider profiles), and its Expert Information Service (EIS). For more information, visit <https://www.3plogistics.com>.

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