

Magic Quadrant for Third-Party Logistics

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One in three supply chain leaders expects outsourcing budgets to rise by over 10% in the next two years. This research evaluates leading global 3PL providers, providing organizations with the insights to make informed decisions on outsourcing logistics operations.

Market Definition/Description

Gartner defines a third-party logistics (3PL) provider as a logistics service provider that moves, stores and manages the flow and distribution of products and materials on behalf of its customers for a fee without taking ownership. The 3PL will typically provide and manage operations that must include warehousing, transportation or value-added services that can be scaled and customized to the shipper's needs.

3PL providers solve the challenge of efficiently managing the movement, storage and distribution of goods by enabling companies to outsource complex logistics operations, thereby reducing operational costs, improving supply chain visibility and supporting business scalability.

Mandatory Features

- **Transportation management and freight brokerage**, including load management and dispatch, and multimodal transport operations (e.g., road, parcel, intermodal, rail, etc.)
- **Warehousing, consolidation and deconsolidation, cross-docking, distribution and fulfillment (contract logistics)**, including storage, inventory management, last-mile distribution, order fulfillment and returns management

- **International logistics management**, such as air and ocean freight forwarding, multimodal transport including customs brokerage
- **Transportation track and trace/visibility tools** and reporting

Common Features

- Value-added services, including purchase/sales order management, data capture, performance reporting and optimization
- Transportation procurement services and carrier portfolio management (assisting in the procurement and ongoing management of transport carriers/haulers or regional or product specialist transport providers beyond standard networks)
- Extended order fulfillment services (managing the receipt and dispatch of customer orders, including picking, packing and kitting, customer service and quality control)
- Logistics or transport control towers for real-time supply chain monitoring and decision making
- Extended logistics visibility systems offering end-to-end tracking and predictive insights across shipments
- Returns processing and management
- Cross-docking services
- Custom packaging, including labeling, bundling and promotional kits
- Project logistics for complex, large-scale infrastructure or industrial projects, typically involving some industry specialization
- Cargo insurance coverage
- E-commerce fulfillment, including order processing, packing and shipping
- Logistics consulting services
- Data and analytics for forecasting, optimization and performance tracking
- Global trade management services
- Freight audit and payment services

Magic Quadrant

Figure 1: Magic Quadrant for Third-Party Logistics



Vendor Strengths and Cautions

Amazon

Amazon is a Challenger in this Magic Quadrant. Headquartered in both Seattle, Washington (HQ1) and Arlington, Virginia (HQ2), Amazon’s 2025 gross logistics revenue, which includes its 3PL Multi-Channel Fulfillment (MCF) services, is reported at \$156 billion. Its distribution

operations encompass 1,200 facilities worldwide. Its MCF offering enables shippers to leverage Amazon's fulfillment network and its support resources as a 3PL to store, pick, pack, ship and deliver from any off-Amazon sales channels, regardless of whether a business sells on Amazon.com or not.

Amazon declined requests for supplemental information or to review the draft contents of this document. Gartner's analysis is therefore based on other credible sources.

Strengths

- **Overall Viability:** Amazon's "Third-Party Seller Services" revenue, which includes its 3PL offerings, had a YoY revenue growth rate of 11%, versus the overall global 3PL revenue growth rate of 8% in 2025. This strong financial position allows Amazon to expand its 3PL service offerings and invest in logistics technologies, such as AI-powered solutions in robotics, IoT for warehouses and routing optimization.
- **Innovation:** The Amazon Industrial Innovation Fund is a \$1 billion investment program focused on warehouse automation and supply chain innovation. Technologies developed are used within Amazon's 3PL operations like Proteus, an autonomous mobile robot designed to operate safely around people and equipment in distribution centers.
- **Service Offering:** Amazon's 3PL services are distinguished by technological sophistication and operational excellence. Services include vast storage capacity and advanced inventory tracking, reverse logistics, and international shipping with end-to-end cross-border logistics, ocean freight, customs clearance and last-mile delivery.

Cautions

- **Marketing Execution:** Amazon's visibility as a traditional 3PL provider has still not been widely established. Its focus on e-commerce fulfillment is well known, but it's just one aspect of 3PL services. Global shippers, particularly large B2B shippers, may be unaware of Amazon's 3PL capabilities in the market.
- **Vertical/Industry Strategy:** Selling 3PL services is not the primary focus of Amazon's overall business model. Shippers must be cognizant of the lack of coverage in some verticals, such as pharma, cold chain, chemicals, aerospace and defense. Amazon will have to demonstrate its ability to support other verticals to be competitive.
- **Geographic Strategy:** Amazon's traditional 3PL service coverage is relatively limited compared to its peers in this Magic Quadrant, with only 20% to 30% of its logistics

footprint utilizing 3PL facilities. Current 3PL-owned facilities are concentrated in North America, Europe and Japan, although future expansion is planned for Latin America, the Middle East and Africa. This current geographic reach may not fully meet the 3PL needs of some global shippers.

A.P. Moller – Maersk

A.P. Moller – Maersk is a Leader in this Magic Quadrant. Headquartered in Copenhagen, Denmark, this integrated logistics business reported \$14.92 billion in revenue from logistics and services in 2024. As a company, Maersk has approximately 110,000 employees in more than 130 countries. It operates a broad service portfolio, including air, ocean, less-than-container load (LCL), customs, supply chain and logistics management, transportation services, control tower visibility, and other value-added services. Maersk's global warehousing footprint comprises over 9.5 million square meters across more than 500 sites. Additionally, Maersk Air Freight operates a global network with 15 core partners and four freighters in its portfolio linking major hubs in Asia, Europe and North America.

Strengths

- **Geographic Strategy:** Maersk's revenue is balanced across North America, Europe and Asia, with each region contributing over 20% to the total. For shippers operating in emerging markets like the Middle East, Africa or Latin America, Maersk demonstrates a large presence, generating nearly 20% of its total revenue from these regions.
- **Marketing Execution:** Maersk consistently ranks among the Leaders in marketing investment and client engagement to strengthen brand presence. It fosters deep client relationships through a multifaceted engagement strategy including thought leadership initiatives, exclusive executive forums and the delivery of curated insights from proprietary analytics.
- **Market Responsiveness/Record:** Maersk closely monitors market trends by developing innovative service offerings (like premium LCL) and advanced digital solutions. Maersk's Studio Suite, launched in 2025, delivers comprehensive solutions for trade and tariff management, supply chain visibility, risk management, developer integration, sustainability initiatives, and GHG emissions reporting.

Cautions

- **Business Model:** Four key customer sectors in retail, high tech, lifestyle and fast-moving consumer goods (FMCG) drive Maersk's growth strategy. As a result, businesses in other industries could perceive limited alignment with Maersk's growth initiatives.
- **Customer Experience:** The company's focus on serving large enterprises can result in less attention and tailored solutions for organizations in the small and medium-size enterprise segment.
- **Sales Strategy:** Maersk's pricing models rely on fixed-cost or cost-plus contracts, which may limit its ability to customize commercial offerings. The company's sales channels are split between transactional and integrated, with one channel focusing on customers with short-term contracts and one focusing on long-term broader solution needs. This may pose challenges for shippers classified as transactional and result in a less tailored and responsive experience.

CEVA Logistics

CEVA Logistics (CEVA) is a Challenger in this Magic Quadrant. Part of the CMA CGM Group, CEVA is headquartered in Marseille, France. CEVA is a global logistics and supply chain company, encompassing freight management and contract logistics operations. It has strong expertise in finished vehicle logistics and services related to the automotive and industrial industries. It reported a gross revenue of \$20.2 billion in 2024. After its acquisition of Bollore Logistics in early 2024, CEVA now employs more than 160,000 staff in 1,500 facilities across 170 countries. This strategic acquisition significantly expanded CEVA's air and ocean freight, particularly in Europe-Asia and Europe-Americas lanes.

CEVA declined requests for supplemental information or to review the draft contents of this document. Gartner's analysis is therefore based on other credible sources.

Strengths

- **Product/Service:** CEVA has restructured its product and service offering into a vertical, product-driven model to ensure consistent global service delivery and accelerate solution engineering across all geographies and industry services. These services support customers through transport management, multimodal distribution, project logistics, event logistics, lead logistics and vehicle logistics, as well as a suite of value added services.

- **Market Responsiveness/Record:** CEVA continues its active responses to market demand through strategic acquisition of localized logistics providers to bolster regional capabilities linked to its key service offerings. Recent acquisitions include Borusan Tedarik in Türkiye, and Italian project logistics specialists Fagioli Group and Cargex for perishables in Latin America.
- **Overall Viability:** CEVA saw significant revenue growth in 2024, up over 50% from 2023 (although a proportion came through the Bolloré Logistics acquisition). Its 2025 growth predictions, while more modest, represent CEVA's resilience and ability to deliver strong growth during uncertain economic times.

Cautions

- **Business Model:** CEVA's focus on internal reorganization and continued integration of Bolloré Logistics kept its international logistics market activity relatively quiet during 2025. 3PL service offerings, technology and digitization are rapidly evolving in the market, so CEVA may need to accelerate its own offerings to keep pace.
- **Innovation:** CEVA continues to invest heavily in innovation, recently partnering with Google to deploy AI across its global shipping and logistics networks. Deploying these solutions equally and effectively across a vast global network will present challenges like workforce disconnect on understanding and deploying a clear strategic direction.
- **Offering Strategy:** Some customers historically rated CEVA's industry-specialized competence lower than other global partners. While its 2026 focus remains on leveraging its new vertical structure to overcome these limitations, customers may approach this with caution as they become familiar with this new structure.

C.H. Robinson

C.H. Robinson is a Leader in this Magic Quadrant. Headquartered in Eden Prairie, Minnesota, C.H. Robinson is a global logistics provider specializing in freight transportation, supply chain management and logistics solutions. C.H. Robinson offers multimodal transportation services including truckload, less-than-truckload (LTL), ocean, air and intermodal combined with managed services and consulting expertise. It reported a gross revenue of \$17.7 billion in 2024, employing approximately 14,000 employees in more than 300 facilities across 39 countries. C.H. Robinson completed the sale of its European surface transportation business

to sender in February 2025. This has allowed C.H. Robinson to focus resources on its North American and Global Forwarding segments.

Strengths

- **Innovation:** C.H. Robinson uses a robust, three-stream innovation process encompassing product discovery, intelligence monitoring and waste elimination. It has invested in several digital solutions such as Always-on Logistics Planner (AOLP) to support supply chain orchestration powered by AI agents and human expertise.
- **Market Understanding:** C.H. Robinson invests in a broad set of shipment orchestration capabilities, including transportation planning and execution, compliance, and PO management. It focuses on developing solutions for top client priorities such as logistics visibility, data governance and route optimization.
- **Offering (Product) Strategy:** C.H. Robinson has developed an extensive suite of digital tools across areas of network modeling, digital control towers, TMS, WMS and advanced analytics. It also focuses on automating high touchpoints such as load planning and documentation.

Cautions

- **Geographic Strategy:** The majority of C.H. Robinson's revenue is generated from the North America market, despite its global presence in other regions. This may concern organizations seeking a truly global partner that can offer a broad range of services in other regions.
- **Marketing Execution:** C.H. Robinson shifted its marketing strategy to a more digitally focused approach. While this enhances digital engagement, it may diminish relationship-building and engagement in markets or situations where personal connections remain critical.
- **Operations:** C.H. Robinson's lower reported employee retention rates versus its competitors in 2025, along with ongoing workforce reductions, could lead to a poor customer experience for some clients.

DHL

DHL is a Leader in this Magic Quadrant. Headquartered in Bonn, Germany, and as part of DHL Group, it is the world's largest global provider of logistical services. Its vertical market

expertise covers aerospace, automotive, chemicals, CPG, e-commerce, energy, engineering and manufacturing, life sciences, retail, returns, life sciences, and technology, among other industries. This research focuses on two divisions, DHL Supply Chain and DHL Global Forwarding, with 188,000 and 47,000 employees, respectively. Combined, these divisions posted total revenue of €37.3 billion for 2024 across 120-plus countries. DHL Supply Chain operates more than 1,350 offices and warehouses, with approximately 40 million square meters of warehouse space.

Strengths

- **Product or Service:** DHL offers a comprehensive suite of logistics solutions, spanning warehousing, transportation, real estate, packaging, e-commerce, service logistics, data and robotics, returns management, digital freight networks, lead logistics partnership, and clinical logistics. By delivering integrated, end-to-end supply chain solutions, DHL positions itself as a strategic partner capable of driving operational efficiency, scalability and innovation for its clients across diverse industries.
- **Vertical/Industry Strategy:** By developing vertical-specific solutions rather than generic logistics offerings, DHL's strategic growth initiatives target high-potential sectors that are growing well above global GDP, like healthcare and high-tech industries.
- **Innovation:** DHL's recent deployment of autonomous decision making enables AI assistants to independently manage logistics tasks such as rerouting shipments, rebalancing inventory and handling supplier communications without manual input. DHL has 94% of operations digitalized and over 8,000 robots supporting the global workforce to drive efficiency and elevate human capabilities throughout its network.

Cautions

- **Sales Strategy:** DHL's revenue growth from existing clients in 2024 was below the industry average in the latest published results, indicating challenges generating growth with its existing customer base. Additionally, DHL reported a YoY decline in customer retention in the reported period (to 4Q24), underscoring a potential area of concern for clients.
- **Business Model:** DHL's profit growth has remained in the low single digits, trailing behind industry peers. The DHL Group as a company experienced a YoY decline in profit margin, highlighting potential challenges in maintaining operational efficiencies for its clients.

- **Sales Execution/Pricing:** DHL's existing commercial portfolio, which includes both traditional closed-book and open-book pricing models, is gradually shifting toward more flexible and outcome-based pricing strategies. However, this transformation is still in the early stages of implementation. As a result, clients that prioritize greater pricing transparency or seek tailored commercial arrangements may find the current level of program adoption insufficient to fully meet their needs.

DP World

DP World is a Niche Player in this Magic Quadrant. DP World is a multinational logistics and supply chain company headquartered in Dubai, United Arab Emirates. It employs more than 115,000 people worldwide across more than 79 countries, served by 560 strategic business units with revenue for 1H25 at \$11.24 billion, an increase of over 20% from 2024. DP World leverages its core capabilities in ports and terminals, marine services, and global logistics to deliver end-to-end freight forwarding and supply chain services to key focus industries including health, chemicals, retail, technology, perishables and automotive.

Strengths

- **Marketing Strategy:** DP World leverages its extensive infrastructure investments and digital integration for "smart logistics," emphasizing sustainability, innovation (AI and digital solutions), and strategic partnerships (DP World Tour, industry events) to drive market penetration in growth regions (India, Africa, South America). This demonstrates how its operational strength can unlock global trade efficiency.
- **Business Model:** DP World is pursuing an integrated end-to-end business model focused on three strategic pillars: (1) capital investments in infrastructure, (2) digital transformation via its technology platform CARGOES and (3) freight forwarding footprint expansion. This growth plan allows it to establish a modern 3PL network that aligns with current logistics requirements.
- **Geographic Strategy:** DP World's headquarters in Dubai offers an opportune platform for customers to explore and expand into growth logistics regions like India and Africa. DP World's global network of 300 freight forwarding offices connects it with shippers across the world.

Cautions

- **Offering/Product Strategy:** DP World's transition from a ports and terminals operator to an integrated global logistics provider requires careful integration of its diverse brands and investments to offer logistics leaders the capabilities they require from their 3PL providers.
- **Innovation:** DP World's dependence on digital trade infrastructure heightens its exposure to cyberthreats. For example, a cyberattack in 2023 disrupted DP World's Australian operations for several days, resulting in a backlog of 30,000 containers. Logistics leaders must thoroughly assess DP World's risk mitigation strategies and cybersecurity measures when making selection decisions.
- **Product or Service:** DP World's expansion into new logistics services, such as contract logistics, air freight and supply chain solutions, requires integrating a growing network of 300 offices and over 100,000 staff, which might create operational challenges for some clients.

DSV

DSV is a Leader in this Magic Quadrant. Headquartered in Hedeheusene, Denmark, DSV was established in 1976, offering 3PL services in road, air, sea and project transport, as well as warehousing and supply chain management. After its acquisition of DB Schenker was completed in April 2025, DSV's global network now spans more than 90 countries and approximately 160,000 employees. DSV reported DKK 175.6 billion in revenue for the first nine months of 2025. The vendor offers solutions in key verticals (automotive, aerospace, consumer, healthcare, industrial and technology) and more than 15 subverticals. It operates 400 warehouses with a total capacity of more than 6 million square meters.

Strengths

- **Market Understanding:** DSV has strong expertise in key logistics capabilities affecting clients, including global trade flows, digitalization, emerging technologies like AI and sustainability initiatives. Proactively monitoring and responding to these trends allows DSV to deliver highly relevant and value-driven service offerings.
- **Business Model:** DSV has strategically expanded its presence across high-growth regions, including the Asia/Pacific region, Latin America, Africa and Eastern Europe. Furthermore, integrating the DB Schenker acquisition strengthens DSV's global network and underscores the company's proven capability to execute and capitalize on strategic mergers and acquisitions for client benefit.

- **Overall Viability:** The DB Schenker acquisition substantially boosted DSV's revenue growth in 2025, with 3Q25 revenue reaching DKK 72 billion (a 63% YoY increase) and year-to-date totaling DKK 176 billion. The acquisition illustrates DSV's commitment to strengthening its position in the 3PL market.

Cautions

- **Sales Strategy:** DSV's sales strategy focuses on large global organizations, while sometimes providing less attention to smaller enterprises. DSV's large organizational structure also naturally leads to a more rigid working process. This inflexibility can present a challenge for shippers, particularly when attempting to resolve localized issues.
- **Marketing Strategy:** Compared to some of its 3PL competitors, DSV's market visibility among B2C shippers is relatively subdued. DSV's brand presence is primarily anchored in its operational excellence in the B2B logistic sector, rather than high-profile, consumer-facing initiatives. This lack of visibility might cause some clients seeking B2C expertise to overlook DSV.
- **Sales ExecutionPricing:** DSV generally favors activity-based costing (ABC) or hybrid pricing models for its contract customers, as these approaches closely align costs with actual service usage. Although DSV is willing to consider alternative contract structures in specific cases, shippers with highly complex operational requirements may find that a hybrid model does not always best suit their needs.

Expeditors

Expeditors is a Challenger in this Magic Quadrant. Headquartered in Seattle, Washington, Expeditors is a global logistics and freight forwarding 3PL, offering supply chain solutions encompassing air and ocean freight, customs brokerage, and warehousing. As of 2025, Expeditors' workforce was made up of approximately 19,000 employees supporting operations across North America, the Asia/Pacific region, Europe and Latin America. The company reported around \$14.5 billion in fiscal revenue for 2025. Expeditors deploys an asset-light operating model supported by advanced technology platforms.

Expeditors declined requests for supplemental information or to review the draft contents of this document. Gartner's analysis is therefore based on other credible sources.

Strengths

- **Overall Viability:** Expeditors showed improved revenue results in 2025, with a 12.54% YoY revenue increase for the trailing 12 months (TTM) ending 3Q25. Increased volumes in air freight and ocean, especially in South Asia, along with trade agreement fluctuations, helped offset softening ocean rates.
- **Sales Execution/Pricing:** Expeditors' strategy focuses on pricing discipline, network density and technology to navigate market volatility, shifting from volume-driven growth to value-added services like customs brokerage. This drives margin stability despite fluctuating air/ocean rates. Expeditors maintains a direct sales force with strong client relationships, leveraging its digital platform and global network.
- **Operations:** Expeditors maintains a rigorous vendor management program designed to ensure that all third-party service providers, such as carriers, customs brokers and technology partners, consistently perform to defined SLAs or higher standards. This helps ensure both a high level of service and efficiency for its clients.

Cautions

- **Marketing Strategy:** Expeditors takes a muted marketing approach that limits its visibility in the 3PL marketplace and excludes some clients from accessing its offerings. Its marketing spend as a percentage of revenue is typically less than 1%, reflecting its focus on relationship-based business development and operational excellence rather than broad marketing campaigns.
- **Vertical/Industry Strategy:** Expeditors' strategy focuses on organic growth via a non-asset-based approach that relies on a global network of third-party carriers and facilities. Logistics leaders with aggressive expansion plans should assess whether this dependence on third-party carriers leaves Expeditors vulnerable to market volatility and capacity constraints.
- **Sales Strategy:** Expeditors' growth strategy intentionally focuses on organic expansion. Although fostering close relationships with existing customers supports retention and drives organic growth, this approach can limit the company's ability to acquire new clients. As a result, it may restrict opportunities to increase scale and diversify service offerings for its current customer base.

GEODIS is a Challenger in this Magic Quadrant. GEODIS is a global provider of transportation, warehousing, global logistics and supply chain solutions with a workforce of more than 50,000 employees. It is owned by SNCF Group and headquartered in Levallois-Perret, France, with a global network of 1,079 locations covering nearly 166 countries. It reported €11.3 billion in revenue for 2024. GEODIS offers services to a wide range of vertical industries, including retail, FMCG, healthcare, industrial, high tech and automotive. GEODIS recently acquired French full truckload (FTL) leader Malherbe and Swiss freight company ITS to strengthen its network in Europe.

GEODIS declined requests for supplemental information or to review the draft contents of this document. Gartner's analysis is therefore based on other credible sources.

Strengths

- **Market Responsiveness/Record:** GEODIS uses a variety of tools and solutions to stay agile in the logistics market. For example, its Transportation Rate Management solution integrates multiple data sources and analytics. These tools help GEODIS respond to market changes and secure both immediate and long-term savings for clients.
- **Product Offering:** GEODIS offers one of the broadest product suites among the vendors evaluated in this Magic Quadrant. Services range from standard air, ocean and road forwarding to value-added services like product customization, packaging services, and aftermarket and technical services. This provides its clients access to comprehensive, single-provider solutions.
- **Operations:** The vendor's broad global network allows it to deploy a high level of differentiation across its operations. For example, it manages high-complexity businesses including aerospace and defense, oil and gas, renewable energies, and automotive.

Cautions

- **Business Model:** GEODIS remains a conventional 3PL partner that offers strong operational and network-based services. Shippers seeking a highly-digital service offering may be better served by other 3PL vendors evaluated in this Magic Quadrant.
- **Sales Strategy:** GEODIS positions itself as a growth partner for customers. However, the premium nature of its offerings, coupled with declining revenue over the past two years, places pressure on GEODIS to achieve commercial growth in 2026 and beyond that may impact the pricing strategies it adopts with customers.

- **Marketing Strategy:** The vendor's marketing strategy is built around its Ambition 2027 plan, which aims to provide sustainable and ethical logistics solutions, improve digital capabilities, and strengthen client partnerships. Current macroeconomic and geopolitical uncertainties may make customers skeptical about how GEODIS might deliver all aspects of this plan, however.

Hellmann Worldwide Logistics

Hellmann Worldwide Logistics (Hellmann) is a Niche Player in this Magic Quadrant. Headquartered in Osnabrück, Germany, Hellmann's global network of 248 offices in 61 countries, supported by approximately 12,000 employees, moves over 20 million shipments per year. It achieved €3.8 billion in revenue in 2024. The company has a broad offering of air freight, ocean, road, rail, and contract and custom logistics services. It supports industries such as fashion, automotive, healthcare, consumer goods, renewables, marine and cruise, industrial and technology. In 2025, Hellmann acquired full ownership of HPL Apollo, a move that solidified its logistics solutions for fresh produce, flowers and temperature-sensitive food. Hellmann operates a global warehousing network of over 700,000 square meters of storage space.

Hellmann Worldwide Logistics did not respond to requests for supplemental information. Gartner's analysis is therefore based on other credible sources.

Strengths

- **Customer Experience:** Hellmann drives customer experience by prioritizing personalized service that empowers local teams to provide responsiveness. It's known for offering tailored logistics solutions using a sector-specific approach based on individual customers' needs to develop long-term relationships.
- **Sales Execution/Pricing:** Hellmann's partnership and integration with cargo.one has modernized Hellman's air cargo pricing, enabling sales teams to deliver fast, accurate and competitive rates with data-rich air freight pricing. This transformation benefited shippers and drove revenue growth above the industry average.
- **Market Responsiveness/Record:** Hellmann's digital tools like Smart Air, Smart Ocean and AI-driven document processing offer resilient and personalized logistics solutions. In 2025, it launched the HEX platform that offers small and midsize businesses fast, simplified global air freight booking at competitive rates.

Cautions

- **Sales Strategy:** Hellmann is prioritizing digital sales enablement to drive more effective lead generation and conversion by leveraging advanced digital tools and analytics. However, its shipment volumes have remained flat YoY, raising questions as to whether these digital sales enablement initiatives have resonated with its clients.
- **Offering (Product) Strategy:** Hellmann offers a range of value-added services such as quality control, reprocessing, sequencing, accessory fitting, light assembly and specialized labeling. These services primarily target retail, automotive and life sciences, so clients in other industries should consider this when evaluating their offerings.
- **Innovation:** Hellmann has developed key partnerships with Dronamics for autonomous middle-mile delivery and Geek+ for autonomous mobile robots in major hubs. Hellmann lacks a significant budget for R&D efforts. It tends to focus more on practical, scalable innovation that may be less advanced or mature than that of its peers.

Hyundai Glovis

Hyundai Glovis is a Niche Player in this Magic Quadrant. It is a global logistics company headquartered in Seoul, South Korea, and is part of the Hyundai Motor Group. It operates a global logistics network with major hubs in Seoul (Korea), Irvine (U.S.) and Eschborn (Germany) providing transport, distribution and integrated supply chain services across industries, with a focus on the automotive sector.

Hyundai Glovis declined requests for supplemental information or to review the draft contents of this document. Gartner's analysis is therefore based on other credible sources.

Strengths

- **Industry Strategy:** Hyundai Glovis is a leading global 3PL specializing in the automotive sector, with plans to expand into full-service supply chain solutions by 2030, including EV battery and energy logistics. In 2024, it invested \$110 million for a 34.9% stake in Asiana Airlines' cargo division to strengthen its air freight capabilities.
- **Business Model:** Founded in 2001 to optimize logistics for Hyundai Motor Group, Hyundai Glovis has grown into a global logistics provider operating in over 100 countries. Leveraging its automotive expertise, it now offers solutions for related sectors such as industrial manufacturing, project and bulk logistics, and EV battery recycling.

- **Sales Strategy:** Its sales strategy is defined by an aggressive shift toward nonaffiliate client acquisition, digital transformation and expansion into high-growth logistics sectors. The company aims to increase annual revenue to over \$29 billion by 2030. This is highlighted through new partnerships with OEMs like BYD and Volkswagen, and targeting nonautomotive sectors, including steel, energy and construction.

Cautions

- **Marketing Execution:** Hyundai Glovis, similar to other organizations that transition into full service 3PLs, faces several hurdles to convince customers that they can provide a truly end-to-end logistics solution and become a diversified global leader in logistics. Its exposure across the 3PL market is limited, so customers should exercise caution regarding its ability to deliver on any marketing promises.
- **Geographic Strategy:** Hyundai Glovis has a dominant market position across Korea and Asia. Recent investments support its expansion into Europe through a joint venture with Stena Line, the acquisition of Polish logistics company Adampol S.A., and investment in rail corridors between Asia and Europe. However, limited investment in North America and Latin America restricts its global reach.
- **Marketing Strategy:** The vendor's strategy to diversify beyond the automotive sector comes at a challenging time. It must contend with rising trade barriers, increased competition, supply chain disruptions, economic pressures, digital transformation and labor shortages. In the near term, this may limit its ability to serve clients in industries outside of automotive.

Kintetsu World Express

Kintetsu World Express (KWE) is a Niche Player in this Magic Quadrant. KWE is a global logistics and freight forwarding organization headquartered in Tokyo, Japan, providing air/sea freight forwarding, customs brokerage services and warehouse management services. Established in 1970, KWE employs over 18,000 personnel worldwide operating in 45 countries globally with revenue of approximately \$4.6 billion. KWE operates across most industry verticals, including electronics, automotive, healthcare, retail, aerospace, food and beverage manufacturing, and materials and energy. It was added to the CDP A List for the first time in 2025, highlighting its focus on sustainability and environmental issues.

Kintetsu World Express declined requests for supplemental information or to review the draft contents of this document. Gartner's analysis is therefore based on other credible sources.

Strengths

- **Sales Execution/Pricing:** KWE's global growth strategy includes an air freight volume target of over 1 million tons and sea freight for over 1 million TEUs. These growth targets signal that KWE is very much open for new business opportunities. Customers seeking new 3PL partners may find KWE very competitive.
- **Customer Experience:** KWE is integrating some operations with APL Logistics (a fully owned subsidiary of KWE) to develop more customized and industry-specific solutions. Logistics leaders seeking a full-service vendor with end-to-end logistics capability could benefit from this alignment.
- **Geographic Strategy:** KWE's network of over 700 offices in 300 cities worldwide gives customers reliable global coverage and local expertise. Its regional management system ensures smooth, end-to-end transportation and delivery across every major continent.

Cautions

- **Product Strategy:** KWE's core business system (UFS+), supported by its customer service system (CSS+), provides effective operational execution and support for most enterprises. However, larger enterprise customers may find more advanced systems capable of delivering more value across their supply chain from other vendors evaluated in this Magic Quadrant.
- **Innovation:** KWE falls behind some of its competitors in customer-facing innovations linked to automation, network data and visibility solutions. Its short-term focus is building robust internal systems, data security and business continuity management, which may constrain more mature customers or those seeking greater integration.
- **Marketing Strategy:** KWE is building brand awareness in key industry verticals like automotive, electronics, retail and healthcare. Customers in these sectors may find that other 3PLs offer more advanced, tailored solutions.

KLN Logistics Group (KLN), rebranded from Kerry Logistics, is a Niche Player in this Magic Quadrant. It is a Hong Kong-based, global 3PL provider that offers supply chain solutions from integrated logistics, international freight forwarding (air, ocean, road, rail and multimodal), e-commerce, express parcel, and industrial project logistics. Postacquisition by S.F. Holding, KLN moved into an asset-light operating model focusing on operational excellence and technology. It has a global presence across 59 countries and territories, with more than 18,000 employees. KLN offers local expertise spanning China, Thailand, Vietnam, Malaysia, Singapore and India as its major hubs. The company generated gross revenue in 2024 of \$7.5 billion. It serves as the largest trans-Pacific NVOCC for ocean freight services, positioning it as a significant competitor in the market.

KLN Logistics Group declined requests for supplemental information or to review the draft contents of this document. Gartner's analysis is therefore based on other credible sources.

Strengths

- **Overall Viability:** While KLN's growth remains concentrated in the Asia/Pacific region, the company is proactively supporting clients' network diversification strategies beyond China. By expanding its capabilities and presence in emerging markets, KLN is positioned to serve multinational clients and broaden its customer base in a volatile trade environment.
- **Sales Execution/Pricing:** KLN's revenue growth outperformed the industry average, underscoring its effectiveness in commercial strategy and operational execution. KLN's dynamic pricing strategies and focus on value-added services enabled it to secure long-term contracts and sustainable profitability.
- **Customer Experience:** KLN's customer experience strategy emphasizes operational partnership over transactional service, focusing on hypervisibility, regional accountability and integrated speed. Vertical pod organization and decentralized decision making ensure customers receive hands-on, agile support.

Cautions

- **Geographic Strategy:** KLN's heavy focus on the Asia/Pacific region increases risk compared to more diversified peers, making its Asia-first strategy a liability as manufacturing shifts and trade patterns evolve. This could pose limitations for logistics leaders looking for alternatives to Asia/Pacific operations.

- **Sales Strategy:** KLN generates a significant portion of its revenue from the high-tech sector. This vertical concentration results in substantial exposure to both regional and sector-specific risks, highlighting a lack of diversification in KLN's revenue streams, so customers from other vertical industries may not find this 3PL a good fit.
- **Offering (Product) Strategy:** KLN provides comprehensive value-added services and solutions. However, these services are predominantly offered at the origin, resulting in limited destination service capabilities. Logistics leaders seeking end-to-end services would be better serviced by other 3PLs.

Kuehne+Nagel

Kuehne+Nagel (K+N) is a Leader in this Magic Quadrant. Headquartered in Schindellegi, Switzerland, K+N is one of the world's largest providers of non-asset-based logistics services. It is present in almost 100 countries, employs more than 80,000 people worldwide across 1,300 locations, and manages nearly 4.3 million 20-foot equivalent units (TEUs) in sea freight and more than 2.2 million tons in air freight per year, making it the world's largest NVOCC ocean and air freight forwarder. Its net turnover was CHF 18.5 billion in the first nine months of 2025, a 3% increase from the same period in 2024. In response to market challenges, K+N is implementing cost reductions focused on efficiency, automation and sustainable solutions to manage volatility and support long-term growth.

Strengths

- **Market Understanding:** K+N leads in technology application by adopting digitization and automation as key pillars of its future strategy. Innovations, such as tailor-made generative AI algorithms to detect and remove customer master data errors, and digital twins, help customers deliver operational efficiency and administrative productivity gains.
- **Vertical Industry Strategy:** Customers benefit from K+N's strong industry expertise, tailored solutions and strategic acquisitions, such as Apex Logistics, a leading air freight forwarder in China, and IMC Logistics, a leading drayage provider in North America. K+N also acquired Farrow for trade management and City Zone Express for cross-border road transport in the Asia/Pacific region, enhancing its capabilities and supporting market share growth as a leading 3PL.
- **Product Strategy:** K+N's Roadmap 2026 framework drove its 2025 product strategy, focusing on high-growth industry segments like cloud infrastructure, semiconductors,

healthcare and perishables. Customers in these segments were offered an attractive proposition to support this expansion.

Cautions

- **Business Model:** K+N's asset-light business model relies on relatively stable market conditions to deliver on efficiency and performance. In a period of high price volatility and growing competition, customers should test K+N's ability to adapt and respond without jeopardizing service and price competition.
- **Overall Viability:** With the slump in European logistics demand, K+N's cost reduction program will put its extensive European road and contract logistics operations into focus for improved efficiency and growth. This may strain some customer relations and commercial models.
- **Sales Execution/Pricing:** As the world's leading ocean freight forwarder, K+N has faced significant challenges in this segment due to persistent market overcapacity and the resulting downward pressure on yields. These conditions have contributed to a 13% decline in EBIT during the first nine months of 2025. Consequently, some customers may be inclined to leverage this margin pressure to negotiate more favorable pricing during upcoming rate reviews.

Lineage

Lineage is a Niche Player in this year's Magic Quadrant. Lineage is headquartered in Novi, Michigan. It is the world's largest temperature-controlled logistics solution provider primarily focusing on the food supply chain. Lineage offers integrated transportation services including truckload, LTL, drayage, intermodal and customs brokerage. It also offers extensive value-added services such as blast freezing, kitting, packaging, repacking, bagging, labeling and fumigation, among others. Lineage reported gross revenue of \$5.3 billion in 2024 and 26,000 employees in more than 480 facilities across over 20 countries. Its expansive network comprises storage capacity totaling more than 3 billion cubic feet.

Lineage declined requests for supplemental information or to review the draft contents of this document. Gartner's analysis is therefore based on other credible sources.

Strengths

- **Business Model:** Lineage has demonstrated a robust track record of strategic growth through acquisitions, completing over 110 transactions since 2012. This acquisition

strategy has provided logistics leaders with access to new global capacity and enhanced market density through its expanding geographic footprint.

- **Overall Viability:** Lineage supports continued growth by combining advanced technology with the AI-driven LinOS platform across its 480 facilities, including more than 80 fully automated warehouses. Customers benefit by sharing in cost optimization gains from initiatives such as operational process efficiency and energy savings.
- **Vertical/Industry Strategy:** Lineage serves vertical industries such as the food, beverage and life sciences sectors, delivering end-to-end temperature-controlled logistics solutions. Customers in these sectors benefit from a technology-driven, “one-stop-shop” offering, emphasizing the integration of freight forwarding, land transport and warehousing for its clients.

Cautions

- **Geographic Strategy:** Lineage offers global geographic coverage, but relies on partner agents in some regions. Lineage faces significant gaps in Africa, parts of South America and interior Asia that may challenge shippers seeking services in those regions.
- **Marketing Strategy:** Lineage often focuses its marketing efforts on decision makers within cold chain segments like food and beverage manufacturing, retail and food service, potentially overlooking broader audiences and limiting opportunities for other industry engagements.
- **Innovation:** While customers generally commend Lineage for its advanced digital and technological capabilities, some operational reviews reveal occasional dissatisfaction with site-specific service levels. These challenges may relate to operational execution issues that Lineage’s technology initiatives are designed to address.

LOGISTEED

LOGISTEED is a Niche Player in this year’s Magic Quadrant. Headquartered in Tokyo, Japan, it offers a wide variety of supply chain solutions. Its diversified service offerings include contract logistics, freight forwarding, logistics consulting, logistics system design and development, heavy transport, and relocation services. For the fiscal year ended 31 March 2025, the company reported revenue of ¥910.7 billion, with a total of 56,227 employees and 1,003 facilities globally, operating in 30 countries.

LOGISTEED declined requests for supplemental information or to review the draft contents of this document. Gartner's analysis is therefore based on other credible sources.

Strengths

- **Vertical/Industry Strategy:** LOGISTEED seeks to optimize all stages of the supply chain, ensuring seamless coordination from raw materials to end customers. Clients can benefit from enhanced efficiency, synchronization and vertical integration across its operations.
- **Market Understanding:** LOGISTEED's use of advanced technologies like IoT and AI, along with e-commerce and fourth-party logistics (4PL) services, shows its strength in delivering modern logistics solutions. Clients benefit from improved efficiency, visibility and flexibility, helping them optimize supply chains and stay competitive.
- **Offering (Product) Strategy:** LOGISTEED'S value-added services and its customer-centric approach enable clients to streamline operations and respond quickly to market demands. In addition, Japan Post's agreement in October 2025 to acquire a 19.9% stake in LOGISTEED will strengthen its logistics offerings to clients.

Cautions

- **Marketing Execution:** While LOGISTEED focuses on providing more specialized services tailored to specific verticals, its visibility in the global 3PL marketplace is somewhat limited compared to other vendors evaluated in this Magic Quadrant. Broadening marketing efforts to showcase adaptable logistics expertise will provide logistics leaders with new alternatives for their 3PL networks.
- **Marketing Strategy:** LOGISTEED's marketing strategy primarily centers on holistic, technology-driven, globally integrated supply chain solutions. This may inadvertently restrict its adaptability to some logistics leaders' specific needs.
- **Market Responsiveness/Record:** Although LOGISTEED addressed some of the industry trends like digitalization and automation, its progress has lagged behind the 3PL industry. This may impact its clients, restricting solution scalability and customization options.

NX Group

NX Group is a Challenger in this year's Magic Quadrant. NX Group is a global logistics service company headquartered in Tokyo, Japan. It is present in 57 countries, employing

76,000 people worldwide across 1,800 locations. It provides air freight, ocean freight, ground transport (truck/rail) and hazardous goods transport. NX Group also has a significant footprint in contract logistics operations, with more than 15.9 million square meters of warehouse space across the Americas, EMEA and the Asia/Pacific region. NX Group offers solutions by industry verticals, including advisory and special capabilities in semiconductor, healthcare, mobility, technology and lifestyle. In 2025, NX Group acquired the Simon Hegele Group to expand its contract logistics footprint and healthcare solutions.

Strengths

- **Operations:** NX Group actively tracks its NX Core Engagement Score to assess employee engagement and operational effectiveness. NX Group set an ambitious target to reduce CO2 emissions by 50% across the group by 2030, which may benefit shippers meeting their emissions targets. Additionally, NX Group is adding the CargoWise operating system to its stack to further standardize and streamline global operations.
- **Product or Service:** NX Group offers comprehensive global 3PL services, including ocean and air forwarding, contract logistics, and freight visibility. Shippers in specialized industries such as mobility, technology, semiconductor, healthcare and lifestyle can benefit from NX Group's tailored business solutions.
- **Overall Viability:** Acquisitions have driven NX Group's growth, allowing it to surpass peers in identifying and capitalizing on new opportunities. It has significantly expanded its e-commerce fulfillment network in the Asia/Pacific region. Additionally, NX Group's extensive warehouse footprint ranks it among the top five globally for shippers seeking a global partner in contract logistics.

Cautions

- **Innovation:** NX Group has invested in practical, scalable technologies, including self-driving forklifts, robotic arms for container unloading, smartwatches to enhance driver safety and digital twins for staff simulation. However, compared to its peers, NX Group is regarded as conservative in adopting cutting-edge solutions. This cautious approach may not align with progressive logistics leaders seeking to drive innovation within their operations.
- **Business Model:** NX Group's strong revenue growth outpaces peers, but declining YoY profits suggest this may come at the expense of profitability. Its heavy reliance on Asia

and Middle East markets for growth results in an unbalanced portfolio that may concern shippers seeking more geographically diversified partners.

- **Marketing Strategy:** NX Group dedicates a relatively small share of its budget to brand marketing, and its engagement initiatives are generally less sophisticated than its industry peers. This limited investment in customer engagement could constrain the company's service offerings to meet the needs of some logistics leaders.

Rhenus Group

Rhenus Group is a Niche Player in this Magic Quadrant. Founded in 1912, Rhenus Group is a global logistics specialist with headquarters in Holzwickede, Germany, with an annual turnover of approximately EUR 8.2 billion. Rhenus has a network of 1,330 facilities staffed by 41,000 employees located in over 70 countries. Rhenus provides a wide range of supply chain solutions, including multimodal transport, warehousing, customs clearance, port logistics and contract logistics services.

Rhenus Group declined requests for supplemental information or to review the draft contents of this document. Gartner's analysis is therefore based on other credible sources.

Strengths

- **Sales Execution/Pricing:** Rhenus often operates on long-term customer contracts, which helps insulate parts of the business from some economic volatility. This strategy allows for more stability in pricing programs that benefit its clients.
- **Market Responsiveness/Record:** Rhenus addresses market impacts by using AI-enabled data analytics across its integrated services. This supports end-to-end visibility, enabling rapid response to market events and reducing customer exposure to risk and disruptions.
- **Innovation:** Rhenus Innovation Hub (RIH) in Hong Kong is a platform integrated within Rhenus' warehousing solutions operations. It focuses on developing and testing scalable, modern warehousing solutions to improve efficiency and meet evolving customer needs.

Cautions

- **Business Model:** The company's growth strategy is centered on a combination of strategic acquisitions, sector-specific specialization and a strong focus on digital

solutions. This strategy may not be a fit for some logistics leaders' 3PL service requirements.

- **Marketing Execution:** Despite its status as a major global logistics provider, the company faces ongoing challenges with brand visibility in the highly competitive 3PL sector. Rhenus struggles to clearly differentiate its value proposition, resulting in some clients remaining unaware of the full scope of services available to them.
- **Sales Strategy:** The company's large-scale innovation strategy can result in increased costs and complex technology implementations. Logistics leaders who prioritize simpler, more cost-effective solutions that are quick and easy to deploy may find Rhenus' offerings less compatible with their operational needs.

UPS Supply Chain Solutions

UPS Supply Chain Solutions (UPS SCS) is a Leader in this Magic Quadrant. UPS SCS is headquartered in Atlanta, Georgia, with 2024 revenue of \$12.73 billion. It offers a comprehensive suite of logistics services, including warehousing and distribution services, air and ocean freight forwarding, customs brokerage, road transportation, and 4PL services. UPS SCS serves a number of key vertical industries, including healthcare, life sciences, automotive, high tech, consumer retail, industrial manufacturing and aerospace.

UPS SCS declined requests for supplemental information or to review the draft contents of this document. Gartner's analysis is therefore based on other credible sources.

Strengths

- **Market Responsiveness/Record:** UPS SCS clients leverage UPS' Network of the Future initiative with AI-driven insights, and integrated Trade Direct services for enhanced visibility and resilience. These tools and capabilities allow proactive risk management for clients, such as collaborative demand forecasting, leading to faster recovery during disruptions.
- **Marketing Execution:** UPS SCS maintains strong brand visibility in the 3PL marketplace, leveraging its integrated global network technology (like Flex Global View, Track Alert API and the Supply Chain Symphony platform). This enables end-to-end visibility and scalable logistics solutions for its clients.
- **Customer Experience:** UPS SCS characterizes its client experience through its "Customer First, People Led, Innovation Driven" strategy. Gartner Peer Insights reviews for UPS SCS

show 79% of customers willing to recommend the services, with feedback highlighting competitive pricing and reliable service.

Cautions

- **Sales Strategy:** UPS SCS focuses its business growth efforts on the healthcare and life sciences, e-commerce and retail, and industrial manufacturing/high-tech sectors. Logistics leaders operating outside these verticals may find that the range of solutions available to them is limited.
- **Sales Execution/Pricing:** UPS SCS has secured a leading position in healthcare logistics services. Investments in UPS Healthcare Cold Chain (which requires specialized infrastructure, skills and labor) are increasing operational costs. Customers may see their prices rise and flexibility reduced as UPS SCS seeks to mitigate the impact on its profit margins.
- **Business model:** Although UPS SCS functions as a subsidiary of one of the world's largest parcel delivery companies, UPS does not actively promote the advantages of bundling its services. As a result, some clients are unable to fully leverage the potential synergies, particularly missing out on the added value provided by the last-mile delivery component within its service portfolio.

Yusen Logistics

Yusen Logistics is a Niche Player in this Magic Quadrant. Headquartered in Tokyo, Japan, it generated \$4.7 billion revenue in 2024. A subsidiary of the NYK Group, it operates across 46 countries and regions, with 748 distribution centers and offices globally supported by 25,358 employees. Yusen Logistics, finalized the acquisition of Walden Group's healthcare logistics businesses, Movianto, Eurotranspharma and Transpharma International. This deal expands Yusen Logistics' European capabilities in pharmaceutical and medical supply chains, and marks the third major logistics acquisition by NYK Group within 18 months, underscoring its intent to consolidate and scale Yusen Logistics.

Strengths

- **Operations:** As part of Yusen Logistics "Transform 2025" vision, the organization operates under a global quality management structure called Y.E.S (Yusen Excellence System). This system standardizes quality across Yusen Logistics' global health and safety, process

standardization, Kaizen activities and management quality to underpin the delivery of quality operations to their customer.

- **Innovation:** Yusen Logistics is aggressively upgrading its European network for 2025 and 2026, featuring a massive 165-robot Geek+ Shelf-to-Person deployment at a 1.2-million-square-foot Northampton, U.K., facility to accelerate B2B/B2C fulfillment. Simultaneously, a new highly automated, 15,000-pallet pharmaceutical warehouse in Antwerp, Belgium, is enhancing cold chain efficiency with 24/7 autonomous capabilities.
- **Geographic Strategy:** Yusen Logistics' geographic strategy in 2026 centers on its "Area Strategy," one of three pillars in its comprehensive 3D Management approach to deliver standardized and quality service to all customers, regardless of location. As of 2026, the company operates over 748 distribution centers across 46 countries.

Cautions

- **Sales Strategy:** Yusen Logistics looks to standardize its approach to customer sales and business development to create a more unified approach, which could be too rigid for many customers desiring customization together with agility and flexibility from sales and account management teams.
- **Marketing Strategy:** Yusen Logistics has a long history in logistics and supply chain since its founding in 1955. This history comes with legacy processes, fragmented operations and a dominant home base. For logistics leaders seeking a unified and integrated global logistics provider, this can present a challenge.
- **Business Model:** Despite Yusen Logistics' strategic acquisitions, over 50% of the company's revenue is generated from the Asia/Pacific region, with 19% coming from the Americas and 28% from Europe. As a result, logistics leaders seeking a more globally balanced network may wish to explore additional options in the marketplace to ensure alignment with their specific requirements.

Vendors Added and Dropped

We review and adjust our inclusion criteria for Magic Quadrants as markets change. As a result of these adjustments, the mix of vendors in any Magic Quadrant may change over time. A vendor's appearance in a Magic Quadrant one year and not the next does not necessarily indicate that we have changed our opinion of that vendor. It may be a reflection

of a change in the market and, therefore, changed evaluation criteria, or of a change of focus by that vendor.

Added

- C.H. Robinson
- Hyundai Glovis
- Kintetsu World Express
- Lineage
- LOGISTEED
- Rhenus Group

Dropped

- DB Schenker: DSV completed its acquisition of DB Schenker in April 2025.

Inclusion and Exclusion Criteria

Participants in the Magic Quadrant for Third-Party Logistics must provide all the following services:

- Transportation management and freight brokerage
- Warehousing, consolidation, distribution and fulfillment (contract logistics)
- International logistics management (such as air and ocean freight forwarding)
- Technology services (e.g., shipment visibility, purchase order management, WMS/TMS)

The above services must have been part of their service offering by 1 January 2025.

Participants must also meet all the following criteria:

- Annual revenue threshold must exceed \$3 billion in 3PL mandatory services.
- The 3PL must have logistics service coverage in all major regions (North America, EMEA, Latin America, Asia/Pacific)

- The 3PL should not generate more than 70% of its revenue exclusively from a single region.

Honorable Mentions

Several logistics providers were excluded from this Magic Quadrant. These providers did not meet some or all the inclusion qualification criteria for revenue, service diversification and regional diversification.

However, these providers may be a good option for organizations looking for regional or industry-specific capabilities.

CJ Logistics (part of the CJ Group) is headquartered in Seoul, South Korea, and provides integrated supply chain solutions, from parcel delivery and warehousing to air/sea freight and consulting, serving diverse industries globally. It has expanded its operations to include logistics and other transportation-related areas in more than 32 countries, 137 cities and 462 hubs. CJ Logistics did not meet the regional revenue diversification criterion to qualify for this year's Magic Quadrant.

DACHSER is a global logistics company headquartered in Kempten, Germany. It is one of Germany's 50 largest family-owned enterprises, with 37,268 employees and 433 locations worldwide. Key business divisions include DACHSER Air & Sea Logistics, DACHSER European Logistics and DACHSER Food Logistics. Its logistics network is one of the most extensive across Europe. DACHSER did not meet the regional revenue diversification criterion to qualify for this year's Magic Quadrant.

GXO Logistics is a global logistics company headquartered in Greenwich, Connecticut. GXO operates over 1,000 locations totaling approximately 200 million square feet in 27 countries and employs more than 150,000 people. GXO offers advanced automation capabilities, e-commerce expertise and reverse logistics services, as well as other traditional 3PL capabilities for its clients. GXO Logistics did not meet the range of global service offerings criterion to qualify for this year's Magic Quadrant.

J.B. Hunt, headquartered in Lowell, Arkansas, is one of the largest transportation and logistics companies in North America, offering a wide range of services, including intermodal, dedicated contract services, truckload and integrated supply chain solutions. It operates through five segments: Intermodal, Dedicated Contract Services, Integrated Capacity Solutions, Final Mile Services and Truckload. It operates over 122,000 pieces of

company-owned trailers with over 8,000 company drivers. J.B. Hunt did not meet the regional revenue diversification criterion to qualify for this year's Magic Quadrant.

Penske Logistics, with headquarters in Reading, Pennsylvania, Penske offers solutions such as dedicated transportation, distribution center management, lead logistics, supply chain management, transportation management, freight brokerage and a comprehensive array of technologies to support its clients. Penske manages over 21 million square feet of space across more than 150 facilities, with a significant footprint in the U.S., Canada, Mexico, Brazil and Europe. Penske Logistics did not meet the regional revenue diversification criterion to qualify for this year's Magic Quadrant.

Ryder Supply Chain Solutions (SCS), a division of Ryder System, is a provider of outsourced logistics and transportation headquartered in Coral Gables, Florida. The company employs approximately 50,700 full-time employees supporting 42,700 customers across the U.S., Canada and Mexico. This includes 13,400 professional drivers and 5,000 trained technicians, operating approximately 300 warehouses encompassing over 95 to 100 million square feet of space. Ryder SCS did not meet the regional revenue diversification criterion to qualify for this year's Magic Quadrant.

Sinotrans, headquartered in Beijing, China, is an integrated logistics provider operating across Asia, Europe, Africa, North America, South America and Oceania, with its strongest presence in China. It offers freight forwarding (sea, air, rail), supply chain management, warehousing and e-commerce logistics, handling 7.9 million TEUs annually and employing over 30,000 people. Sinotrans did not meet the regional revenue diversification criterion to qualify for this year's Magic Quadrant.

Total Quality Logistics (TQL) is one of the largest freight brokerage and third-party logistics firms in North America, headquartered in Cincinnati, Ohio. The company specializes in connecting shippers with a vast network of carriers, offering services that include full truckload, LTL, ocean, drayage, air, customs, Mexico and Canada cross-border, intermodal, heavy haul, and warehousing. Total Quality Logistics did not meet the regional diversification criterion to qualify for this year's Magic Quadrant.

Uber Freight, headquartered in Chicago, Illinois, is a freight and logistics provider that operates a managed transportation and brokerage model supported by proprietary technology. The company employs more than 4,000 people across North America (U.S., Canada and Mexico) and Europe (Netherlands, Germany and Poland). Uber Freight manages shipments across truckload, LTL, intermodal, cross-border, customs brokerage, managed

transportation and parcel. Its platform supports execution, capacity sourcing, real-time tracking and network optimization across modes. Uber Freight did not meet the regional revenue diversification criterion to qualify for this year's Magic Quadrant.

Evaluation Criteria

Magic Quadrants are made up of two major axes, Ability to Execute and Completeness of Vision, which have seven and eight subcriteria, respectively. To create a Magic Quadrant that would be valuable to logistics leaders, we developed a definition of what a good preferred global logistics provider is in the context of the criteria for the two axes. The detailed list of criteria for each axis and a short description of each criterion are provided below.

Within the process of evaluation, analyst assessments of provider-submitted data and vendor briefings, as well as customer feedback in more than 20 key topic areas, are used to assimilate the ratings. Each analyst evaluating the Magic Quadrant for Third-Party Logistics participates in hundreds of client interactions in all major global geographies on global transport and logistics. Where providers decline to participate and do not submit data or provide vendor briefings, publicly available information is used.

Gartner does not consider carriers or asset-based operators such as airlines, couriers, integrators,

railways and shipping lines to be 3PLs in the context of this research.

Other types of companies, such as contract manufacturers, wholesale distributors, consulting

organizations and business process outsourcing providers, may offer some logistics services as part of

what they do. However, since these logistics services are not their core business, Gartner does not

classify them as 3PLs. As a result, they are not included in this research.

Ability to Execute

Ability to Execute identifies and assesses the ability of an organization to shape and augment its services to capture the needs of the industry and its clients in a continually

changing logistics landscape. An organization that demonstrates a strong Ability to Execute logistical services across all its product disciplines, and consistently in all operating regions, will score highly in the Magic Quadrant.

- **Product or Service:** This involves the combination of breadth and depth of services offered for customers. It also includes how broadly the services are offered geographically, and to what extent they are standardized and consistently available globally. This includes current services offered, quality of delivery, capability sets and skills, industry and regional specialization, technological support and usage, and the seamless integration of services defined and desired by the market.
- **Overall Viability:** This is an assessment of the organization's financial health. It's also an assessment of the financial and practical success of the business, and the likelihood that the business will continue offering its services and will continue investing in and expanding its services and capabilities. Additionally, this includes consideration of whether the vendor has the business capability to advance the state of the art in supply chain according to customers' needs.
- **Sales Execution/Pricing:** This includes the provider's ability to consistently offer rates competitive with the market and for the value of the service. It evaluates the commercial team's new opportunity approach, solution design, ability to negotiate and hold appropriate pricing, and flexibility to create attractive contract terms that drive profitable and valuable relationships with customers.
- **Market Responsiveness/Record:** This is the 3PL's ability to respond to customers, change direction, be flexible and achieve competitive success as opportunities develop, competitors act, customer needs evolve and market dynamics change.
- **Marketing Execution:** This covers the 3PL's clarity, quality, creativity and efficacy of programs designed to deliver the organization's message. It includes assessment of the programs' ability to influence the market, promote the brand and business, increase awareness of services and capabilities, establish a positive identification of the organization and its reputation, and contribute to sales growth.
- **Customer Experience:** This involves the 3PL's ability to manage its existing customers' supply chain needs consistently and efficiently to match or exceed customer expectations. Areas such as flawless logistics service execution, customer-oriented culture, relationship structure and management, communications frequency and

mechanisms, performance reporting, issue resolution, and overall customer support are considered.

- **Operations:** This involves the systemic ability of the provider to run the business well while meeting its customer goals and commitments. Assessed here are the 3PL's management style, talent development and management, experience and tenure, IT systems capabilities and governance, corporate social responsibility (CSR) programs, and contingency plans.

Ability to Execute Evaluation Criteria

<i>Evaluation Criteria</i>	<i>Weighting</i>
Product or Service	High
Overall Viability	Medium
Sales Execution/Pricing	High
Market Responsiveness/Record	High
Marketing Execution	Low
Customer Experience	High
Operations	High

Source: Gartner (March 2026)

Completeness of Vision

Completeness of Vision In a shifting and dynamic logistics ecosystem is key, as it sets the Leaders apart from the Challengers in this Magic Quadrant. This is especially the case with increasing pressure to assimilate with supply chain requirements and execute strong,

cohesive visions for the future of clients' needs, which aligns to the overall landscape each provider operates within.

- **Market Understanding:** This is the ability of the 3PL to understand business, supply chain and market trends, and translate those into industry-specific and/or domain-specific supply chain services. The 3PL that shows understanding of the market offers integrated, industry-specific supply chain solutions that consistently address the top-of-mind trends in the industry. It also realizes that customers in different segments require different levels of service and relationships.
- **Marketing Strategy:** This includes examples of a clear and differentiated strategy to spread the company's brand and reputation messaging globally, which supports consistent production of new sales opportunities and gaining of additional business within existing accounts.
- **Sales Strategy:** This is the provider's strategy for driving future business development, including its approach to keeping prices competitive over time and in varying economic conditions. Better sales strategies outline methods for segmenting customer types and aligning proper service and pricing profiles for each, as well as specializing its approach to prospects by industry.
- **Offering (Product) Strategy:** This is the provider's strategy for offering uniform, configurable and integrated solutions globally across the three major logistics services. The provider has a strategy to offer service delivery that matches or exceeds client requirements for cost, quality and differentiated service, and enables continuous improvement and innovation in line with clients' business objectives.
- **Business Model:** This involves the stability, soundness and logic of the 3PL's underlying business operating model, in terms of satisfying the range of clients' current and future business requirements and objectives. It also includes supporting a profitable business for its shareholders. This criterion evaluates the design and execution of an investment and growth strategy, including the mixture of organic and M&A growth.
- **Vertical/Industry Strategy:** This is the 3PL's strategy to invest in and tailor resources, skills and service offerings to different industry segments. It provides industry-specific specialization and increasing integration into end-to-end vertical supply chain solutions. Depth and magnitude of industry coverage are considered.

- **Innovation:** This involves provider support for the investment in, and development of, differentiated services for its customers. This is done by leveraging an organized innovation generation capability and a process methodology that uses a combination of specialized competence, creativity, technology and governance. The degree to which this innovation is specialized by industry and recognized by customers is also considered.
- **Geographic Strategy:** This includes directing and managing resources, skills and offerings to meet the specific needs of geographies outside the 3PL's "home" base, either directly or through partners or subsidiaries. Customer requirements, as a part of the vendor's global logistics coverage strategy, are also considered. This includes depth and range of support for many of the most desired emerging trade markets.

Completeness of Vision Evaluation Criteria

<i>Evaluation Criteria</i>	<i>Weighting</i>
Market Understanding	High
Marketing Strategy	Low
Sales Strategy	Medium
Offering (Product) Strategy	High
Business Model	Medium
Vertical/Industry Strategy	High
Innovation	High
Geographic Strategy	Medium

Source: Gartner (March 2026)

Quadrant Descriptions

Leaders

Leaders rate well on the highly weighted criteria for both Ability to Execute and Completeness of Vision. Leaders generally represent a greater range and depth of value-added services and at a higher level of maturity. This means leading providers have extensive service and technology offerings and infrastructure, which make them available across an expansive global footprint. They understand the market, trends and customer needs, and translate those into well-executed service offerings, further specialized for any number of industries. They are formidable at logistics execution across the service lines and run highly professional, comprehensive logistics businesses.

Leaders also have well-structured strategies and business models to continue to expand their capabilities, regional coverage and industry specialization, and they are adept at offering services for different customer segments. They invest in innovative mechanisms and capabilities to advance the art of logistics in the industry. Leaders are trusted and relied on by many of the largest global corporations to help them execute their worldwide supply chains.

Challengers

Challengers characteristically perform logistics functions exceptionally well on behalf of their customers across a broad spectrum of geographies. However, they usually trail the Leaders in some of the highly rated Completeness of Vision criteria. For example, they might lack the span of service offerings or depth in industry-specialized solutions seen in the Leaders. Although Challengers demonstrate solid performance in today's logistics industry, they are unlikely to invest in or deliver the same level of innovative solutions as the Leaders. Challengers may not have the clarity and completeness in their strategies for growth to meet global customers' needs.

Visionaries

Visionaries display process, technological or business model innovation, and influence (or will soon influence) the direction of the logistics industry. They are differentiated due to their deep integration with the clients operations, offering services beyond the traditional scope of logistics. However, they are limited in some of the highly rated Ability to Execute criteria.

Typically, their services and market coverage are more specialized, and they are not established enough on the global stage to challenge the leading providers.

Niche Players

Niche Players offer a more limited set of logistics services or operate primarily in a more limited number of regions than their competitors. Niche Players may have an abundance of services, but don't offer them on a global scale to compete with the Leaders, or as requested by the largest customers. These providers usually demonstrate reduced capabilities when compared with the Challengers and Leaders in at least one of the highly rated criteria, such as industry-specialized services. However, Niche Players can have strong performance in some specific areas, such as in regions or individual logistics services.

Context

To meet the changing trends and demands of shippers, global 3PL providers are constantly expanding their service offerings. This has led to the emergence of specialized services and technology options, featuring a range of competencies, from technology-driven solutions to asset-heavy logistics partners. This shift in the competitive landscape aligns with the dynamic environment that logistics leaders operate in, as they seek access to a broader array of products and services.

The following critical factors were identified as key market trends where more mature 3PLs demonstrated clear strategies and solutions that helped position them in this year's Magic Quadrant.

Critical Factor No. 1: Cost Reduction or Optimization

The pressure to optimize logistics cost never abates. Whether driven by inflationary pressures or other cost factors, spend on logistics activities is increasing. According to the 2026 Gartner Logistics and External Manufacturing Outsourcing Trends Survey, 87% of organizations expect their investment in internal logistics knowledge, skills, and training to increase in the next two years in an effort to combat these inevitable increases from their 3PLs. ¹ Additionally, the economic outlook remains uncertain; therefore, logistics leaders are prioritizing efforts that accelerate cost optimization initiatives. These include engaging and sharing the burden of cost optimization with 3PL partners and service providers.

Critical Factor No. 2: Customer Satisfaction

In the current economic environment, retaining customers is critical for stability and organic growth. Customers are challenging whether they are receiving value for their money from 3PLs and the services they provide. Value for money is no longer reflected by low rates; it is aligned to providing service excellence that delivers customer satisfaction at a price that is fair to both parties. 3PLs must demonstrate their abilities to deliver, measure and sustain their customers' satisfaction with services.

Critical Factor No. 3: Risk Management and Mitigation

Risk and disruption, along with supply chain resilience strategies, have become a top priority on companies' agendas. Logistics leaders are now expected to monitor and anticipate risks, prepare contingency plans, and mitigate the consequences of disruption. 3PL partners play a pivotal role in supporting customers to build the necessary capabilities to manage risks. 3PLs must demonstrate their investment in risk-monitoring capabilities and how these mitigation offerings can reduce risk for their clients.

Critical Factor No. 4: Leveraging Technological Applications

For many logistics leaders, there is a continuing need for conventional technologies, such as TMS and real-time transportation visibility platforms that enable track and trace of orders and shipments. Those same logistics leaders also want to leverage WMSs that provide inventory visibility and control, and improved productivity in warehouses and distribution centers. 3PLs must demonstrate the capabilities, and value delivered, of both conventional and innovative technologies offered to their customers.

Critical Factor No. 5: Future of Logistics

The logistics industry maintains the unique position of being a leading indicator of economic downturns and upswings. However, logistics leaders are being challenged to better predict, prepare and, most importantly, mitigate future disruptive events and industry trends. Logistics leaders are increasingly turning to their 3PL partners to help interpret the future direction of the industry. 3PLs must articulate their vision of the future, demonstrating the impact on costs, performance and people that will shape their logistics operations.

Market Overview

The logistics outsourcing market continues to benefit from a mature and advanced pool of 3PL vendors. With 89% of organizations expecting their use of supply chain outsourcing to increase in the next two years, according to the 2026 Gartner Logistics and External Manufacturing Outsourcing Trends Survey, the demand for 3PL outsourcing has never been higher.

That survey has also revealed several key trends that are reshaping the logistics outsourcing marketplace. The dynamic environment for 3PLs continues to intensify, maturing the market's offerings, all for the benefit of shippers. At the same time, this competitive landscape continues to pressure revenue growth for 3PLs more than in previous years.

The 2026 Gartner Logistics and External Manufacturing Outsourcing Trends Survey validates these trends, which include cost optimization, improved overall performance and increased flexibility of network design as the top three drivers for outsourcing logistics, making supply chains more complex than ever before. In fact, the complexity of working with multiple partners, new geopolitical pressures and cybersecurity concerns are the top three logistics outsourcing challenges over the next two years.

In addition, the logistics labor market is changing. Digitalization has changed the skills needed by logistics staff to be successful. The 2026 Gartner Logistics and External Manufacturing Outsourcing Trends Survey found that 87% of organizations expect their investment in internal logistics knowledge, skills and training to increase in the next two years. And logistics leaders are, in part, seeking access to this premium talent from their 3PL partners, which can provide them with advanced talent pools without burdening them with direct-hire commitments.

These new market trends have led 3PL vendors to focus more on advanced supply chain activities, expanding their capabilities in order to offer end-to-end supply chain services, including the use of 4PL services. Logistics leaders are now being urged by senior management to move from execution efficiencies to end-to-end productivity improvements, and 3PLs are increasingly enabling shippers to deliver on these demands.

⊕ Evidence

⊕ Evaluation Criteria Definitions

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