

## 3PL Performance and Profitability 2014

Q2 / 2014



Telephone: +44 (0)1707 372211  
Email: [info@analytiqa.com](mailto:info@analytiqa.com)

[www.analytiqa.com](http://www.analytiqa.com)

## **3PL Performance and Profitability 2014**

has been researched and compiled in-house by **Analytiqa** using both secondary and primary research sources and includes analysis and insight on the following 3PLs:

**Agility Logistics**

**CEVA Logistics**

**C.H. Robinson**

**Con-way**

**Damco**

**DB Schenker**

**DP-DHL**

**DSV**

**Expeditors**

**FedEx**

**GEFCO**

**Geodis**

**Kuehne + Nagel**

**Logwin**

**Norbert Dentressangle**

**Panalpina**

**Toll**

**UPS**

**Wincanton**

**Yusen Logistics**

**With analysis of trends across service sectors, key vertical industries and global logistics markets**

## ***A qualified, independent and unbiased perspective on the performance of the 3PL industry... and its future strategic direction***

***...an essential tool for anybody reliant on the performance of this sector in a challenging global economy.***

### ***Why publish a '3PL Performance and Profitability' report?***

With the logistics industry often viewed as something of a barometer for wider economic performance, it is certainly not a great revelation to report that third party logistics service providers (3PLs) continue to face challenges to their financial success, as the global economy struggles to recover.

What is insightful, however, is how the wider economic challenges have impacted upon companies of different sizes, in different geographies and across service sectors, such as freight forwarding or contract logistics – and the different actions and strategies 3PLs have put in place to overcome these obstacles.

For some, merely maintaining both revenues and / or profitability continues to be challenging.

3PLs have had to adjust their targets, business models and allocation of resources to adapt to what is commonly accepted as the 'new normal' across service sectors, industry verticals and diverse international markets.

However, the very broad and diverse nature of supply chains means that logistics markets are performing with different degrees of success, challenges and opportunity, dependent upon geography, service sector and vertical industry.

This report takes some of the industry's leading players and analyses their results, performance and strategies as a benchmark for the sector as a whole, to identify, compare and contrast not only their financial numbers, but the courses of action and growth opportunities that 3PLs are exploiting to steer themselves successfully into the future.

### ***Scope of this report***

Top-level insight into the financial performance of major logistics companies

Benchmark, compare and contrast company revenues and profitability

Understand trends by geography, service sector and vertical industry

Identify the actions taken by 3PLs to secure profitability

Strategic road-map: see where and how 3PLs are exploiting growth opportunities

## How can this report **benefit** your business?

In a challenging and competitive market, this report will assist 3PLs, manufacturers, retailers, and industry service providers to make sense of recent market dynamics, financial and operational performances and likely future developments.

This report provides the latest up-to-date information, delivering in-depth data and an understanding of trends across the outsourced sector of the supply chain. This will assist you to understand the many factors that shape the market and its likely future direction.



**>Improve performance by understanding the benchmarks and successes achieved by key industry operators**

**>Prioritise customer targeting, leading to quicker revenue wins, by identifying faster growing operators**

**>Focus sales efforts to markets or regions which offer higher growth potential**

**>Achieve higher ROI on investments by prioritising and aligning strategies with highly performing companies**

**>Produce highly focused marketing campaigns, boosting customer retention and sales, by demonstrating understanding of market dynamics**

## Report summary

*...table of contents on next page*

<b>Report title:</b>	3PL Performance and Profitability 2014
<b>Report price:</b>	£795 / €895 / US\$1,295 <i>excl tax, exempt with tax no</i>
<b>Publication date:</b>	June 2014
<b>No of pages:</b>	105
<b>Geographic coverage:</b>	Global performance across 20 leading 3PLs
<b>Audience:</b>	Logistics Providers, Freight Forwarders, Road Hauliers, Retailers, Manufacturers, Government Agencies, Property Agents/Developers, Allied Service Companies, Professional Services Companies
<b>Key report benefits:</b>	Independent & unbiased analysis of sector performance - Evaluate the dynamics of the 3PL landscape - Analyse changing revenues and profitability - Identify action taken to reverse poor performances, together with future strategies and opportunities for growth... Receive <b>complimentary</b> access to a copy of the 2013 edition

To obtain your copy of **3PL Performance and Profitability 2014** for only £795 / €895 / US\$1,295 please send an email to [sales@analytiqa.com](mailto:sales@analytiqa.com). You can also view details online at [www.analytiqa.com](http://www.analytiqa.com) or alternatively contact us by telephone on +44 (0)1707 37 22 11.

Delivered to you with the search, cut, paste and translation functionality of:



[www.analytiqa-interactive.com](http://www.analytiqa-interactive.com)

## Table of contents (abridged)

### CHAPTER 1 EXECUTIVE SUMMARY

- 1.1 The onset of recovery in 2013?
- 1.2 Strategies for growth
- 1.3 Cautious optimism for 2014

### CHAPTER 2 INTRODUCTION

- 2.1 Research Objectives
- 2.2 Report Structure
- 2.3 Research Methodology and Data Definitions

### CHAPTER 3 INDUSTRY ANALYSIS 2013

- 3.1 Identifying key industry trends
- 3.2 Logistics industry: growth remains low
- 3.3 Logistics industry shows limited organic growth potential
- 3.4 Express markets driven by eCommerce boom
- 3.5 Stable but low EBIT trends
- 3.6 EBITDA growth returns in 2013 after set-backs in 2012
- 3.7 Express markets adapt to new dynamics
- 3.8 Freight market challenges remain
- 3.9 Growth drivers in Contract Logistics

### CHAPTER 4 INDUSTRY PERFORMANCE 2014

- 4.1 Industry expectations for 2014
- 4.2 Mixed Q1 results send out a warning
  - 4.2.1 Financial performance: compare and contrast
  - 4.2.3 Express markets in 2014
  - 4.2.3 Freight markets in 2014
  - 4.2.4 Contract Logistics in 2014

### CHAPTER 5 STRATEGIES FOR GROWTH

- 5.1 Industry focus
- 5.2 Organic growth v M&A
- 5.3 Industry sector opportunities
- 5.4 Strategies in Express
- 5.5 Freight market strategies
- 5.6 Focus on Contract Logistics
- 5.7 Strategic update 2014

### CHAPTER 6 COMPANY ANALYSIS

- 6.1 Agility Logistics
- 6.2 CEVA Logistics
- 6.3 CH Robinson
- 6.4 Con-way
- 6.5 Damco
- 6.6 DB Schenker
- 6.7 DP-DHL
- 6.8 DSV
- 6.9 Expeditors
- 6.10 FedEx
- 6.11 GEFCO
- 6.12 Geodis
- 6.13 Kuehne + Nagel
- 6.14 Logwin
- 6.15 Norbert Dentressangle
- 6.16 Panalpina
- 6.17 Toll
- 6.18 UPS
- 6.19 Wincanton
- 6.20 Yusen Logistics

### CHAPTER 7 APPENDIX

## Maximise the return on your information investment...

This unique research will be delivered direct to your desktop via Analytiqa's innovative delivery system: **Analytiqa Interactive**, a web based delivery service that provides efficient and effective management of your information. Analytiqa's online information delivery format offers extra functionality, including:

- >> Presentation-ready tables and graphics - copy tables and graphics directly into your own documents >>
- Nine (9) language translation - view any report with a 'side-by-side' translation in French, German, Italian, Portuguese, Spanish, Chinese, Japanese, Korean, Russian.... >> "Cut your own report" - use a keyword search to select only the report sections that are relevant to your project >> Personal library - save your own reports or presentations in your personal library for future use >> Find a specific data point in seconds, create your own report or presentation in minutes using the graphs and data tables contained in the report.

Visit [www.analytiqa-interactive.com](http://www.analytiqa-interactive.com) today, to see what **Analytiqa Interactive** can do for you.