



# Global e-commerce Logistics & e-fulfilment 2025: Report Brochure

Extensive analysis of the core trends influencing the e-commerce logistics market, including retail sales, M&A & consolidation. The report also contains Ti's trusted market size & forecast data & summarises regional specialists in e-commerce logistics.

## THE REPORT CONTAINS:

- **Market size & growth forecasts 2024-2029** - split by region & country specific data for 46 countries.
- **Market segmentation data** - warehousing/fulfilment vs. last mile/transport & domestic vs cross-border.
- **e-commerce sales data & forecasts** - including regional analysis.
- **M&A activity** - analysis & its impact on overall market dynamics.
- **e-commerce logistics competitive analysis.**
- **Profiles of leading e-commerce logistics providers** - estimated revenues, recent acquisitions and regional e-commerce logistics/e-fulfilment service providers.
- **Ti's State of e-commerce logistics survey analysis.**

## REPORT HIGHLIGHTS:

- Despite Trump, global e-commerce logistics and e-fulfilment market expected to soar in 2025.
- The global e-commerce logistics market grew 13.6% year-on-year in 2024 to €521.9 bn.
- In 2024, the global e-commerce logistics market doubled the market value recorded just before the pandemic in 2019.
- Some inflationary pressures persisted in 2024, as y-o-y real growth came in at 9%.
- The North American e-commerce logistics market maintained its lead into 2024, albeit marginally. Asia Pacific came in at a close second.
- In 2024, eCommerce sales reached EUR 3,367.3 bn, marking a strong 15% growth from the previous year.
- M&A activity continues as larger groups seek to capitalise on e-commerce growth by acquiring smaller specialists.

**For further information visit:**

**<https://ti-insight.com/product/e-commerce-logistics-efulfilment-report>**



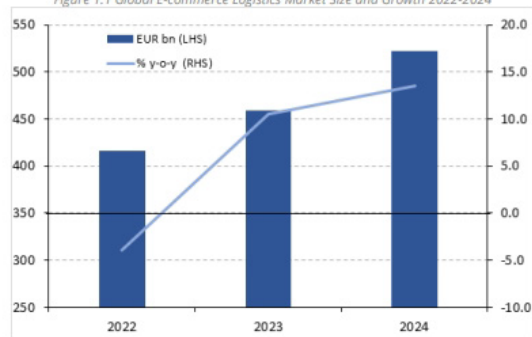
## SAMPLE PAGES:

### 1.0 E-COMMERCE LOGISTICS MARKET SIZE

#### 1.1 GLOBAL E-COMMERCE LOGISTICS MARKET SIZE

Recent data showed the global e-commerce logistics market gaining further momentum in 2024, as more retailers moved online to adapt to the changes in consumer shopping behaviour, catalysed during the pandemic, and as new online shopping platforms, China-affiliated platforms in particular, witnessed strong sales gains. Indeed, the global e-commerce logistics market grew by 13.6% year-on-year (% y-o-y) in 2024 to €521.9 bn, double the market value recorded just before the pandemic in 2019. That said, some inflationary pressures persisted into 2024, as real growth came in at 9.0% y-o-y.

Figure 1.1 Global E-commerce Logistics Market Size and Growth 2022-2024



##### 1.1.1 Global E-commerce Logistics Market by Region

The North American e-commerce logistics market maintained its lead into 2024, albeit marginally, at €200.4 bn, as the Asia-Pacific market came in at a close second, valued at €198.6 bn. Meanwhile, the e-commerce logistics market in Europe stood at €94.6bn in the same year. All the three major markets witnessed healthy double-digit growth in 2024 with the North American, the Asia-Pacific and European markets growing by 14.6%, 14.9% and 9.4% y-o-y, respectively.

#### 3.3 STATE OF LOGISTICS SURVEY

Between January - March 2024, Ti ran a survey aimed at supply chain professionals which sought to gain an understanding of the current state of the logistics market.

##### 3.3.1 E-commerce Volumes

For those respondents that deal with e-commerce volumes, the majority highlighted that e-commerce accounts for between 41-50% of total contract logistics volumes. This is significantly higher than when Ti ran this survey last year, where the majority of respondents stated that e-commerce accounted for 11-20% of total volumes.

This is largely unsurprising; the e-commerce logistics sector has been through a turbulent time the past several years. In 2022, the e-commerce logistics market experienced a notable contraction. This downturn was largely attributed to a normalization of e-commerce sales. Following an unprecedented surge in online shopping during the pandemic, consumer behaviour gradually returned to pre-pandemic patterns, impacting the demand dynamics within the e-commerce logistics space. The market has since adjusted over the past year, reflecting a return to a more sustainable growth rate post-pandemic.

Figure 3.1 State of Logistics Survey: E-commerce as a % of Total Volumes



Respondents reported that on average 65% of their e-commerce volumes are domestic, whilst 35% are international. Respondents expect this split to change quite significantly in the next five years, amounting to 55% for domestic and 45% for international.

International e-commerce is gaining in popularity and is expected to continue its trajectory over the next several years. Chinese operators such as Temu, Shein and AliExpress increasingly popular with western demographics due to their ability to offer extremely discounted goods amid a general cost of living crisis. According to latest market share data, in the U.S Temu has been successfully taking on dollar stores including industry leader Dollar General. In December

## USE THE REPORT TO:

- **Support your strategic planning:** identify high growth markets, sectors & geographies, and adopt effective technology & sustainability initiatives.
- **Assess M&A opportunities:** capture key investment and consolidation opportunities.
- **Understand demand and growth forecasts:** capitalise on key growth areas and emerging trends.
- **Mitigate supply chain risk:** increase resilience in volatile market conditions.
- **Benchmark and optimise supply chain strategies:** capture growth opportunities and gain competitive advantage.

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