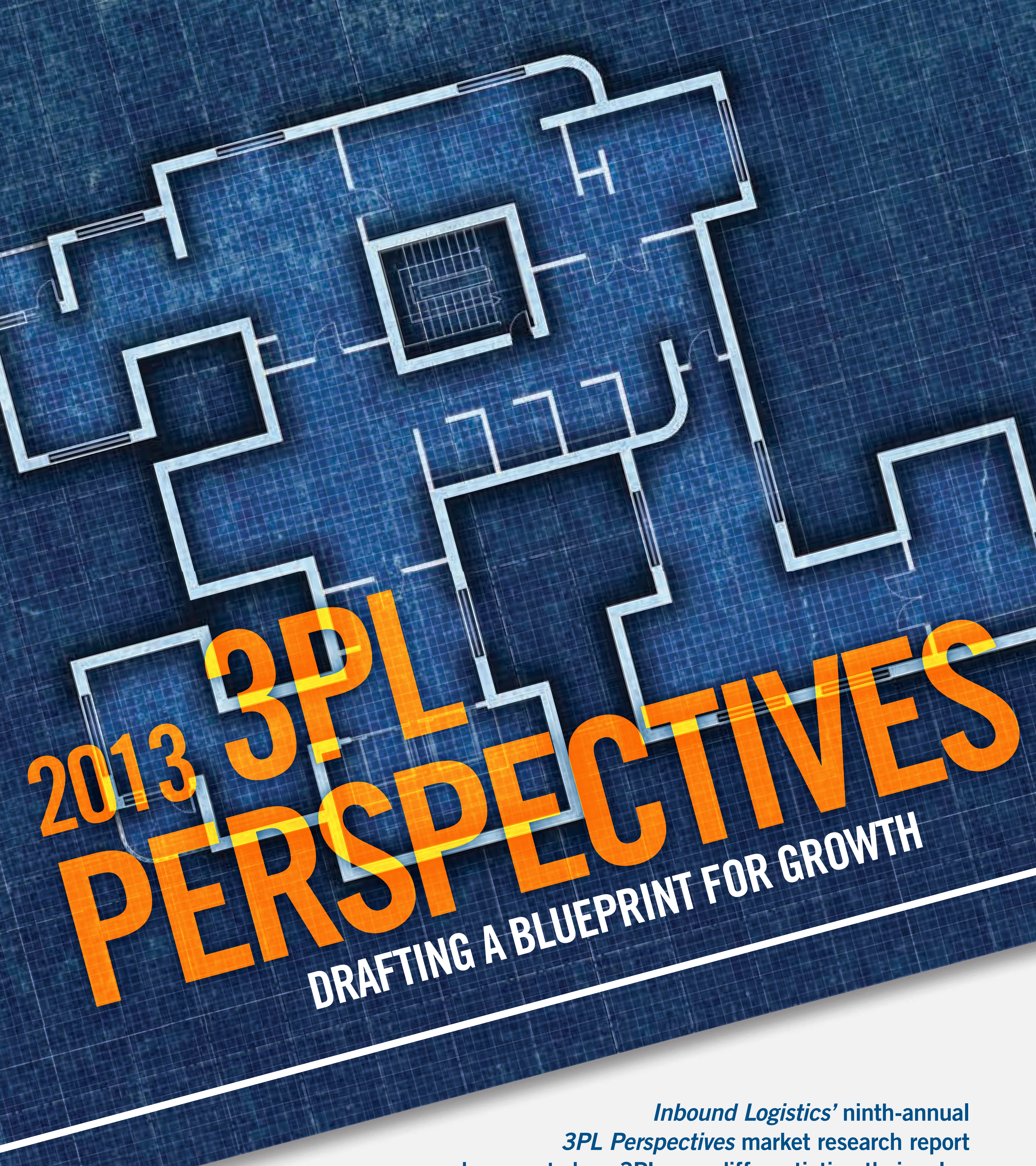


2013 3PL PERSPECTIVES

DRAFTING A BLUEPRINT FOR GROWTH

***Inbound Logistics'* ninth-annual *3PL Perspectives* market research report documents how 3PLs are differentiating their value proposition beyond transactional services–creating an outsourcing blueprint for shippers to grow, in spite of economic uncertainties.**

by Joseph O'Reilly

3PL PERSPECTIVES

DRAFTING A BLUEPRINT FOR GROWTH

Coming out of a down economy, companies were forced to reassess their business models. Many scaled back or divested infrastructure, assets, and labor, then realigned their supply chains and distribution networks accordingly. In the process, they leveraged third-party logistics (3PL) partnerships to variabilize their cost structures, affording them greater flexibility in a risk-averse market. That trend continues today.

Even four years removed from the recession, companies are hypersensitive to shifts in the market. Too many variables—healthcare reform, U.S. manufacturing stops and starts, transportation capacity constraints, fickle consumer confidence, fuel costs, a sluggish global economy, and government regulations—threaten to tip the scales in one direction or another. Shippers know they need to be nimble and responsive to demand, whether it's good or bad. 3PLs provide that cover.

"Customers want to reduce their own in-house operations and take advantage of 3PL shared services to cut overhead," says one 3PL responding to *Inbound Logistics*' 3PL Perspectives market research survey.

It's a common reaction shared by shippers and service providers alike—shared being the operative word. This sensibility demonstrates a marked progression from 2009, when companies hunkered down, reined in spending, tabled growth initiatives, contracted assets, and took solace in the fact that their pain was collective. Uncertainty breeds caution and complacency, which leads to inaction.

While economic conditions today are far less dire, they remain muddled. Yet enterprises have divined new ways to allay risk, grow their business, and maintain a competitive edge—and they're doing it as part of a collective effort orchestrated by countless third-party logistics service providers across the United States and around the world.

In many ways, the trajectory of third-party logistics outsourcing is following a path similar to cloud networking. Legacy warehousing and transportation services are core, and still hold value. But companies have greater affinity for flexible, integrated solutions that feed off different inputs, actualize data, and provide a common platform to engineer new designs; solutions that aren't hardwired into fixed

3PL PERSPECTIVES METHODOLOGY

Every year, ***Inbound Logistics*** conducts an extensive survey of the 3PL market to explore how both service providers and shippers are adapting to change and pushing the outsourcing needle in different directions.

Our outreach effort comprises two parts. First, *IL* solicited questionnaires from more than 300 3PLs detailing the services they provide and their areas of expertise–geographically, functionally, and vertically. We also asked service providers to supplement this empirical data with contextual insight about business during the past year, relationships with customers, and emerging outsourcing trends.

Second, we received input from 9,000-plus 3PL users to provide a counter-perspective of the different forces driving 3PL action and shaping new industry pathways.

Inbound Logistics' 3PL Perspectives juxtaposes these two points of view to provide a robust overview of the trends that are impacting the 3PL space, and how shippers and service providers are responding.

assets or locations, that don't impede the ability to react.

As one service provider shares: "The shift from vertical to virtual integration, collaboration, knowledge of core competencies, and technology are greatly changing third-party logistics partnerships."

A MODEL FOR GROWTH

3PLs are towing a vastly differentiated value proposition compared to nearly one decade ago, when shippers were tapping asset-based intermediaries because of capacity constraints. 3PLs provide warehousing and transportation services—but they're also consultants, integrators, engineers, and insurance agents. And they're selling to a receptive audience.

Ninety percent of service providers surveyed in *IL's* 3PL Perspectives report grew their client base by at least five percent over the past year, compared to 88 percent in 2012, and 73 percent three years ago. Thirty-two percent recorded at least 15-percent growth.

In lock step with customer expansion, 90 percent of 3PLs report growing sales at least five percent during the past year. By comparison, 85 percent indicate profit growth in excess of five percent, up from 81 percent last year.

That profits lag behind sales and customer growth reflects two factors. First, 3PL revenue is similarly impacted by rising operational costs ranging from technology and infrastructure investment to fuel prices and the cost of finding, training, and retaining qualified labor.

Second, the 3PL outsourcing landscape is changing. More small businesses recognize the value of jettisoning non-core transportation and logistics operations. Yields are usually smaller, especially as service providers fill functional needs, then look to grow from there. As such, intermediaries tend to be equal-opportunity partners. Three-quarters of 3PLs say they target companies of all sizes, while 12 percent serve large companies exclusively, 11 percent medium-sized businesses, and two percent smaller organizations.

3PLs are adept at nurturing organic growth opportunities, cross-selling service capabilities and mining new business as they penetrate deeper into the supply chain—especially service providers that have the scale and scope to identify and execute strategic designs. Customers want more integration within their own operations, so they are receptive to these 3PL motions. Service providers that can find synergies across functional areas are better positioned to grow the relationship. To point, 80 percent of 3PLs offer integrated service capabilities, according to this year's report.

3PLs also document more aggressive sales and marketing efforts, investments in technology, and productivity improvements through better key performance indicator measurements as reasons for sustained growth. Some industries—automotive, for example—have rebounded faster than others, so freight volumes and revenue have accelerated at a faster pace.

With so much uncertainty in today's market, and the specter of capacity shortages in sight, companies that have made the decision to partner with 3PLs are inclined to continue along that path. They find few downsides to risk-averse outsourcing arrangements that promise flexibility and cost reductions—and 3PLs are capitalizing on it.

REDEFINING ASSETS

Over the past decade, the 3PL sector has gradually shifted its moorings away from the asset-based foundation from which it sprang. The recession only hastened this transformation as merger and acquisition attrition trimmed excess capacity, and service providers rationalized assets to bring supply more in line with demand. But the real growth has been on the non-asset side of the business.

Nearly half (47 percent) of the 3PLs surveyed this year identify themselves as non-asset-based service providers, while the remainder are split between traditional asset-based 3PLs (11 percent) and those that operate as both (42 percent).

The explosion of freight brokers is notable. Matchmakers find a market in good times and bad—as a means to rate shop when capacity is soft, and access capacity when it becomes tight. Technology has become a competitive differentiator for brokers. And a looming driver shortage means their value will only grow—as will concerns about less-reputable agents and rumors of regulation.

A 3PL EVOLUTION

3PLs are evolving in countless other ways. Consultants that blend strategic oversight and supply chain engineering are bending third-party convention. IT vendors peddling managed technology services, and freight bill audit payment service providers that mine data and prescribe solutions, are blurring lines.

More vertical-centric companies—notably automotive manufacturers and healthcare companies—are spinning off in-house logistics departments and leveraging established distribution networks and dedicated fleets to enter the market. They add flavor to an already diverse pool of providers, and their domain expertise is a key differentiator.

While asset-based 3PLs will come back into vogue as capacity tightens, technology and talent are currently the two most precious commodities in the third-party logistics space. Shippers are looking for solutions providers that can dig deep within silos to extract savings and link functions together more seamlessly to enhance visibility and create efficiencies. This requires engineered solutions—which, in turn, depend on intellectual and IT capital.

To point, 57 percent of surveyed 3PLs identify technology investment as the

greatest challenge they face today (*see Figure 1*). That trumps capacity (55 percent); rising operational costs (52 percent); finding, training, and retaining qualified labor (47 percent); and regulations (47 percent).

Costs and capacity have always been cardinal concerns for logistics service providers. They generally slide up and down, depending on the economy. But 2013 is the first year on record where technology registers as the top challenge—which says a lot about how 3PLs are changing, and where they see the greatest opportunity for market differentiation.

FIGURE 1 **What is the greatest challenge 3PLs face?**

FIGURE 2 **What is the greatest challenge shippers face?**

More telling, *IL's* 2013 Logistics Technology market research report documents that a majority of IT vendors (92 percent) serve 3PLs, warehouses, and carriers—by far the top industry quarry.

Big data's emergence, and the wealth of information gathered and disseminated via social media and cloud networks, require special attention. Only nine percent of shippers identify big data as a concern. What they don't know may hurt them.

THE IT FACTOR

Alternatively, those that don't have the human resources to properly analyze, cleanse, and execute against data are counting on 3PLs to provide these services. In some instances, service providers are leaning on other tech-savvy 3PLs to fill the same need. That's why intermediaries are equally keen to groom logisticians who can fill an emerging generation and talent gap (*see sidebar, page 104*).

Some 3PLs are investing in their own proprietary technologies; others have become secondary channels for IT companies to deliver best-in-class solutions to end users. Consider this: apart from manufacturing (93 percent), the 2PL and 3PL space (86 percent) is the top industry target for logistics service providers, nudging out retail (84 percent). Brokerage activity has long accounted for this penetration, but technology has become a factor as well.

By comparison, only 13 percent of shippers see technology strategy and implementation as a foremost challenge (*see Figure 2*). Many are tapping 3PLs to plug this need.

Cloud-based solution deployments make it even easier for 3PLs to invest in and integrate technology with existing service capabilities—52 percent of surveyed 3PLs report broadly using some form of cloud solutions.

3PL FOUNDATIONS

Inbound Logistics' annual 3PL survey captures insights about how today's logistics service providers are operating and the capabilities they offer. Here's a look at the services and specialties that form the framework of 3PL respondents' businesses.

ASSET-BASED OR NON-ASSET BASED

Non-asset based	47%
Asset based	11%
Both	42%

INDUSTRIES SERVED

Manufacturing	93%
Retail	84%
Wholesale	81%
Services/Government	59%
e-Business	56%

CERTIFICATIONS

SmartWay	61%
ISO	39%
Lean	23%
Six Sigma	26%
C-TPAT	49%
AIB	20%
ICCA	5%

WAREHOUSING SERVICES & CAPABILITIES

Crossdocking	80%
Transloading	69%
Pick/Pack, Subassembly	68%
Fulfillment	66%
DC Management	61%
Vendor Managed Inventory	55%
Site Selection	50%

VERTICAL SPECIALIZATION

Consumer Product Goods (CPG)	79%
Food & Beverage	73%
Electronics	69%
Automotive	66%
Construction & Building Materials	64%
Healthcare	60%
Apparel/Textile	59%
Furniture	54%
Grocery	54%
Pharmaceuticals	50%
Chemicals	50%
Agriculture	43%
Aerospace	38%
Oil & Gas	37%
Renewable Energy (Wind & Solar)	33%
Trade Show	33%

LOGISTICS SERVICES & CAPABILITIES

Inbound Logistics	90%
Integrated Logistics	80%
Inventory Management	68%
JIT	67%
Vendor Management	67%
Lead Logistics Provider/4th-Party Logistics	65%
Logistics Process Reengineering	62%
Shared Services (co-locating, collaborative distribution, etc.)	55%
Payment Auditing/Processing	51%
Global Trade Services	41%

TRANSPORTATION SERVICES & CAPABILITIES

Truckload	95%
LTL	93%
Intermodal	87%
Rail	70%
Air Cargo	65%
Ocean	64%
Dedicated Contract Carriage	61%
Small Package	58%
Bulk	50%
Final Mile	49%
Equipment/Drivers	38%
Fleet Acquisition	22%

SPECIAL SERVICES

Logistics/Transportation Consulting	93%
Direct to Store	74%
Reverse Logistics/Product Lifecycle Management	64%
Import/Export/Customs	64%
Sustainability/Green Logistics	53%
Marketing/Customer Service	51%
Direct to Home	47%
Foreign Trade Zone	41%
Contingency/Crisis Planning	36%
Labor Management	32%
Global Expansion (sourcing and selling)	22%
Security Analysis	20%

TECHNOLOGY/WEB SERVICES & CAPABILITIES

EDI	94%
TMS	84%
Visibility	80%
WMS	66%
Optimization	64%
Customer / Supplier Relationship Management	59%
Freight Payment/Claims/Auditing	55%
Cloud-based Solutions (broadly)	52%
Wireless/RFID	51%
Sustainability	36%
ERP	35%
Predictive Analytics	27%
Global Trade Management	24%

In terms of functional specificity, 84 percent of service providers offer a transportation management solution, followed by visibility (80 percent), warehouse management system (66 percent), and optimization (64 percent.) EDI integration (94 percent) has become an expectation.

FUNCTION JUNCTION

Technology empowers execution. Where 3PLs direct IT spend is telling. Transportation remains a pain point for most shippers—63 percent cite cutting transport costs as their primary challenge (*see Figure* 2). Business process improvement (33 percent), improving customer service (30 percent), supply chain visibility (22 percent), and managing inventory (20 percent) follow in order of priority.

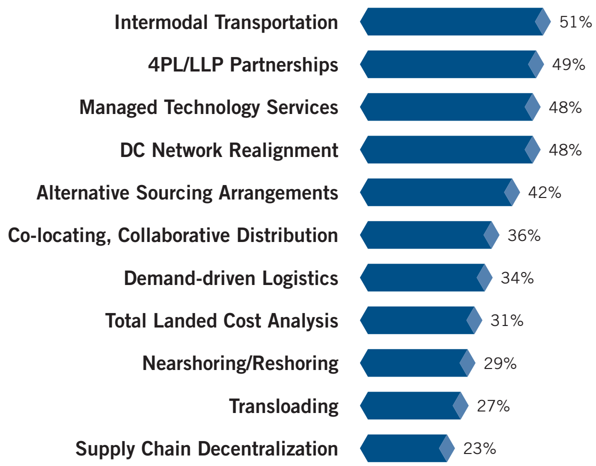
The percentage of shippers underscoring business process strategy is a notable shift compared to 2012, when only 22 percent indicated as much. It demonstrates that 3PL partnerships are growing beyond transactional need; that shippers are leveraging third-party expertise to delve deeper within the supply chain. It reinforces the 3PL's integrated value proposition.

Improving supply chain business processes also dovetails with creating better visibility from demand to supply, and being able to manage inventory accordingly.

Transportation will always be a focal point for 3PL outsourcing because of the length and modal complexity of supply chains and the costs incurred. Ninety-five percent of 3PLs provide truckload capabilities, either on their own or through brokerage networks, followed by LTL (93 percent), intermodal (87 percent), rail (70 percent), and air freight (65 percent).

Whether it's leveraging TMS systems to best match modes and assets to need, mining KPIs and freight bills to identify cost bleeds, or running dedicated fleet operations, service providers offer a plethora of options for shippers to choose from. Increasingly, as external market forces and internal priorities dictate, companies are looking at transportation in a more strategic and integrated way. That often begins with mode selection.

FIGURE 3 **What strategies are shippers and 3PLs using to manage current challenges?**



Asked what strategies they are using to manage current market challenges, 51 percent of 3PLs cite intermodal transportation—the leading answer (*see Figure* 3). In 2012, service providers ranked 4PL/lead logistics provider partnerships as the tactic of choice. This year it ranked second (49 percent), followed by managed technology services and DC network realignment (both 48 percent).

That intermodal weighs on the minds of 3PLs and their customers offers another reminder of the capacity constraints slowly surfacing as the economy and freight volumes recover. More shippers are testing rail/intermodal solutions as a means to economically pull and push product to market. It creates additional capacity, as well as demand for new services that support transloading.

While intermodal has always held court in heavily congested port-centric areas, hinterland connectivity continues to expand. Non-traditional railroad shippers are fast recognizing the efficacy of truck-rail movement for longer hauls—and in some circumstances, even short-haul markets.

COLLABORATION IS KEY

Intermodal is the essence of collaboration. 3PLs are generally best positioned as conduits between different carriers and modes. They have a similar capacity to integrate functions beyond transport. Companies are getting smarter about how they pool resources to drive out costs and gain efficiencies. But in other ways, collaboration is the only option, especially as new regulations go into effect.

Government is still hashing out the final rules of engagement for the U.S. Food and Drug Administration's Food Safety and Modernization Act. When the new regulations are finalized, food distributors and shippers will have to adapt facilities and processes to remain in compliance—and that will increase costs.

Elsewhere, the Federal Motor Carrier Safety Administration's Hours-of-Service rules and Compliance, Safety,

FILLING THE TALENT GAP

While speculation abounds about how a projected shortage of 100,000 truck drivers by 2016 will impact the U.S. transportation industry, far less publicity surrounds the dearth of talent elsewhere in the supply chain–railroad locomotive engineers and tugboat pilots, for example.

The rise of big data has raised similar concerns beyond transportation. Companies are investing in technologies to gather and filter information, but they also need logisticians on the ground capable of interpreting data and executing against it. Equal consideration is given for supply chain engineers who can make conceptual designs actionable.

At a more operational level, warehouses are becoming heavily automated as materials handling and distribution technology integration keep pace with ever-increasing fulfillment demands. Employee training needs to follow suit.

This presents an interesting trichotomy for shippers – 18 percent of survey respondents acknowledge that finding, retaining, and training qualified labor is a challenge; yet 19 percent feel the same way about reducing labor costs. Meanwhile, nearly one-third of shippers cite improving customer service as a concern. Each impacts the other, good and bad.

By comparison, nearly one in two service providers recognize labor as a challenge. They understand the importance of human resources as a competitive differentiator and are investing accordingly.

Accountability (CSA) requirements are impacting driver availability and productivity. Forty-seven percent of 3PLs cite regulations as a challenge.

While far fewer shippers (10 percent) see security and compliance as an equal concern, a driver shortage will impact customer service and raise transportation costs. One way or another, shippers will feel the pinch.

These pressures place greater burden on shippers to engage transportation and logistics partners more collaboratively. The warehouse is teeming with potential. 3PLs have broad traction providing services such as crossdocking (80 percent) and transloading (69 percent).

Maintaining inventory flow—whether it's LTL consolidation through crossdocking, or transloading port drays to rail—provides shippers with opportunities to gain economies of scale.

Inbound and outbound transportation are directly impacted as well. Greater visibility upstream and/or control of inbound shipments from the manufacturer—as well as from a DC to the retailer—helps shippers and consignees accommodate more sophisticated distribution strategies. Companies can similarly leverage transloading or cross-docking to best match mode to demand urgency, provided they have enough lead time.

Often at the behest of intermediaries, companies are finding new opportunities to indirectly partner with other shippers to pool freight, fill truckloads, and reduce costs. Collaborative distribution and multi-tenant warehouses empower 3PLs to negotiate better rates with carriers, and defray operational costs over a broader user base.

Fifty-five percent of surveyed 3PLs offer shared services. But there is room for improvement, as 36 percent identify co-location and collaborative distribution as favored strategies for managing current market challenges.

Inside the DC, as interest rates remain low, companies have been inclined to carry more inventory. Speculative consumer demand has forced many to hedge against out-of-stocks, which is filling warehouse space and raising carrying costs. This places a greater premium on inventory management. Among surveyed shippers, 17 percent report scaling inventory demand is a challenge—on par with last year's figures. Sixty-eight percent of service providers offer inventory management services.

CHANGING CHANNELS

The evolution of omni-channel retailing and direct-to-consumer fulfillment is radically changing the way retailers and wholesalers align their distribution pipelines to manage SKU proliferation and speed-to-market demands.

Some are pushing inventory farther upstream in the supply chain, using postponement tactics to defer value-added costs and gain transportation economies, and leverage demand-driven processes to trigger replenishment. This requires greater communication with, and visibility to, suppliers and manufacturers; many retailers are still seeking direction, as e-commerce remains a relatively "law-less" space.

As testament to this growth, 56 percent of surveyed 3PLs target e-businesses. Specifically, 66 percent and 61 percent offer fulfillment and DC management capabilities, respectively; 47 percent provide direct-to-home delivery services.

Another consequence of e-commerce's rapid growth is the impact on returns management. As consumers order more online, retailers and e-tailers are tasked with efficiently and economically re-appropriating product for secondary sales, recycling, or disposal. To account for this type of after-market demand, 64 percent of 3PLs provide reverse logistics/product lifecycle management services.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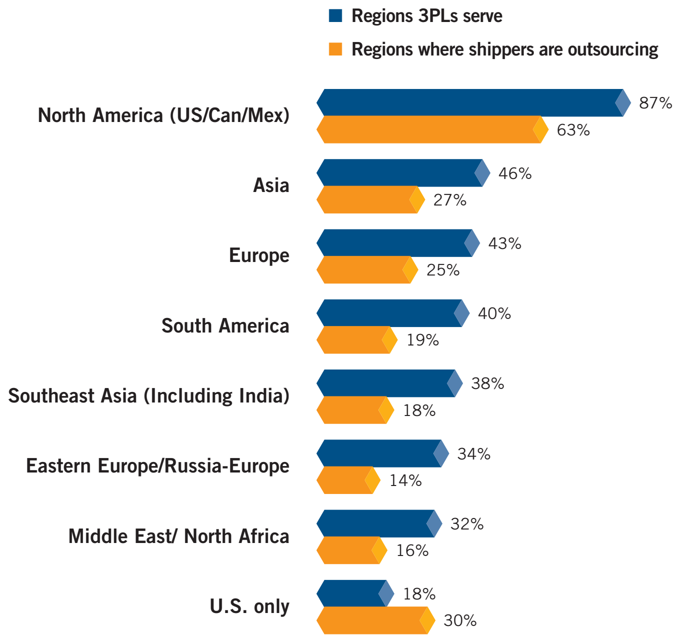
GLOBE PLOTTING

In addition to developing functional expertise, 3PLs are also expanding their global presence. Talk of a U.S. manufacturing resurgence and natural gas energy boom have stoked reshoring speculation. But other considerations come into play: lengthening supply lines, inflation in traditional low-cost manufacturing countries, and a litany of well-documented supply chain disruptions that favor alternative or redundant sourcing strategies.

FIGURE 4 **Geographic scope**



There's also the reality that companies are no longer simply relying on 3PLs to shore up their sourcing options. In 2013, more shipper respondents named expanding to new markets to sell into (19 percent) rather than source from (15 percent) as a challenge (*see Figure 2*).

Ninety-five percent of the world's consumers are outside of the United States. Yet, according to some industry sources, only one percent of the more than 30 million U.S. businesses participate in exports. 3PLs make that leap less daunting.

A consuming global middle class creates new growth targets for manufacturers and retailers. E-commerce's rapid assimilation affords them greater opportunities to tap this emerging demand without establishing a brick-and-mortar presence. Piggybacking on 3PL distribution and fulfillment capabilities in-country has become a common strategy for businesses that don't have the resources or ambition to go it alone.

Global 3PLs generally have broad geographic coverage with their own on-the-ground assets, as well as through contracted partners. Only 15 percent of service providers identify global coverage as a challenge.

Comparable to last year's data, 87 percent of 3PLs serve the North American market, while 18 percent operate exclusively in the United States (*see Figure 4*). Shippers show similar consensus, with 63 percent outsourcing in North America, and 30 percent in the United States alone.

Asia once again leads the list of top regions for 3PL operations (46 percent), displacing Europe (43 percent). South America now ranks third (40 percent), followed by Southeast Asia and India (38 percent), Eastern Europe/Russia-Europe (34 percent), and Middle East/North Africa (32 percent).

South America's prospects continue to attract interest. Reshoring chatter, and buzz about the Panama Canal's imminent expansion, have centered attention on economies such as Brazil, Chile, Colombia, and Peru that are ripe for expansion.

GROWING PAINS AND POTENTIAL

As middle-class consumption increases, imports and exports grow more balanced, which is attractive for shippers, carriers, and service providers alike. But inherent cultural, political, and logistical obstacles make trade in the region challenging. It's the perfect mix of growing pains and growth potential that adds fuel to the 3PL value proposition.

Shippers report a similar global trajectory (*see Figure 4*). Asia and Europe are top outsourcing destinations according to 27 percent and 25 percent of respondents respectively, followed by South America (19 percent), Southeast Asia and India (18 percent), Middle East/North Africa (16 percent), and Eastern Europe/Russia (14 percent).

As European and Asian economies cope with the whiplash effects of a global recession, other areas are opening up and competing for attention.

Russia is expected to be Europe's largest consumer market by 2020; African nations are ramping up port infrastructure development to facilitate export demand for natural resources, and just-in-time manufactured goods; and lower-cost Southeast Asian countries are siphoning manufacturing activity from China. 3PLs are already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making strategic acquisitions and inroads into these markets as they sense a shift in global trade balance. Shippers will follow.

With so many variables at play, companies are circumspect in their globe plotting. Many are looking at total landed cost analysis (31 percent of 3PLs identify this as a strategic priority) to direct network alignment, and identify sourcing points and trade lanes that make the best sense per their specific criteria.

This has fueled supply chain decentralization efforts—where organizations operate regional supply-demand spheres in lieu of a global network—as well as nearshoring/reshoring speculation; 23 and 29 percent of 3PL respondents, respectively, identify these two strategies as important considerations (*see Figure* 3).

No less important, a wave of natural disasters, labor strife, and socio-political unrest over the past few years has made shippers more cautious about how and where they bring product to market. Recent union disquiet at U.S. East and West Coast ports is a telling reminder that companies need to have backdoor options they can execute as necessary. 3PLs provide that flexibility.

SERVICE AT ALL COSTS

Shippers and service providers never enter into a contractual arrangement with expectations that it will fail. When outsourcing is dictated by transactional terms, there's always a tipping point – and it usually falls on the side of pricing.

But as *IL's* research demonstrates, 3PL partnerships are evolving beyond traditional warehousing and transportation contracts. Service providers want to have a vested interest in their customers' supply chain performance, and, in turn, shippers want partners that can serve as an extension of the enterprise and execute strategic business process change. This requires much greater intimacy and information sharing than a spot market or peak season dalliance.

Shipper sentimentality is often contingent on available capacity—or the threat of a major truck driver shortage. Some conjecture that 3PLs have overstated the severity of a capacity crisis to campaign for longer-term partnerships and discourage price-driven transactional business. That remains to be seen.

But is it really worth the risk? The majority of shippers don't think so, according to this year's research. Sixty-four percent of respondents say they value customer service over cost when measuring a 3PL's value (*see Figure* 5). The 36 percent who think otherwise may soon face a sobering reality as they hunt for available space. Then cost will be a real concern—and they won't have a choice.

But just as 3PLs have laid down the gauntlet, they share in the risk of not performing up to par. Half of surveyed shippers cite poor customer service as the number-one reason for failed partnerships, followed by failed expectations (23 percent), and cost (eight percent), among other considerations.

KEEPING IT REAL

3PLs are increasingly realistic about what they can and cannot do. Reputations are at stake. There is too much competition in today's market to promise one thing and deliver another. They also recognize that today's 3PL market is brimming with talent and expertise, especially at the mid-tier level.

Service providers are more specialized by function, vertical, and mode. Often one 3PL is not capable of meeting the specific needs of a customer, especially across lengthening supply chains. Shippers also value the objectivity of having multiple service providers under contract because they can benchmark performance against one another, and tap different perspectives.

This year, 88 percent of 3PLs (89 percent in 2012) indicate customers should consider partnering with more than one service provider, while just 12 percent feel customers should work with only one partner. On this point, shippers are in complete agreement—87 percent of respondents report using more than one 3PL, while only 13 percent have found a one-stop-shop solution. ■

2013 TOP 100 3PLs

Our Top 100 3PL list, as selected by *IL* editors, is a companion piece to 3PL Perspectives. From a sweeping industry overview, this annual compendium celebrates logistics service providers that are at the top of their game, reflecting the diverse panoply of transportation and logistics capabilities that match different shipper demands. As an information source, this directory provides need-to-know information that outlines 3PL services.

Pulling together this list of Top 100 3PLs demands a great deal of due diligence. Nearly 300 companies submitted questionnaires for consideration this year, and *IL* editors conducted a careful analysis of surveys, phone interviews, and online research to qualify and vet these selections.

After you process 3PL Perspectives and parse the Top 100 list, we would like to know what you think. Does the information we provide serve as a resource for your business? Does this information support trends you see in your own day-to-day operations? Email us: editor@inboundlogistics.com