

# Making it Count:

Big and Bulky Last-Mile Delivery in the United States – 2024

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## **About The National Home Delivery Association (NHDA)**

In 2013 ten of the leading home delivery companies specializing in the “white glove” delivery of appliances, furniture and large electronics to homes came together to address common interests. These ten firms founded the National Home Delivery Association with a shared commitment to enhancing the industry through training, setting standards for customer service and enhancing the profile of this vital segment of America’s retail economy. The NHDA has grown to over 70 member companies representing the leading companies in this segment of the logistics industry. Collectively, NHDA members account for over 70% of residential “bulky goods” deliveries and setups, utilizing thousands of delivery teams and logistics professionals across the country.

The National Home Delivery Association (NHDA) is committed to advancing the interests of individuals, companies, and organizations that deliver furniture, appliances, and electronics to the home by promoting the highest standards of professionalism and customer service.

## **About Armstrong & Associates, Inc. (A&A)**

Armstrong & Associates, Inc. was established in 1980 to meet the needs of a newly deregulated domestic transportation market. Since then, through its leading Third-Party Logistics (3PL) market research and history of helping companies outsource logistics functions, A&A has become an internationally recognized key resource for 3PL market information and consulting.

A&A’s mission is to have leading proprietary supply chain knowledge and market research not available anywhere else. As proof of our continued work in supporting our mission, A&A’s 3PL market research is frequently cited in media articles, publications, and securities filings by publicly traded 3PLs. In addition, A&A’s email newsletter currently has over 88,000 subscribers globally.

A&A’s market research complements its consulting activities by providing continually updated data for analysis. Based upon its unsurpassed knowledge of the 3PL market and the operations of leading 3PLs, A&A has provided strategic planning consulting services to over 50 3PLs, supported 26 closed investment transactions, and advised numerous companies looking to benchmark existing 3PL operations or outsource logistics functions.

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## **Introduction**

The National Home Delivery Association (NHDA) and Armstrong & Associates, Inc. (A&A) partnered for this study covering the Third-Party Logistics (3PL) Big and Bulky U.S. Last-Mile Delivery Market to identify current market size, historical growth and outlook, key providers, customers and verticals served, e-commerce's role, and other trends. For the study, we utilized two separate surveys and public information. The surveys were sent to NHDA members and other U.S. last-mile delivery third-party logistics providers (3PLs). 2023 last-mile delivery revenues of the 3PLs analyzed range from \$1.2 million to \$1 billion, representing 34% of the estimated \$10.3 billion U.S. Third-Party Logistics Big and Bulky Last-Mile Delivery Market.

## **Big and Bulky Market Segment Defined**

## **Market Overview**

**Figure 1. U.S. 3PL Big and Bulky Last-Mile Delivery Market (Gross Revenue in US\$ Billions) - 2017-2026E**

**Market Growth Drivers and Trends Outlook**



## Employment Trends and Use of Independent Contractor Trucking Capacity

Figure 2. Owner Operator / Independent Contractor Drivers as a % of Total

**Figure 3. Independent Contractor Turnover in 2023**

**Figure 4. Use of Owner Operator / Independent Contractor Drivers over the next 2-3 Years**



**Table 1. Owner Operator / Independent Contractor Drivers vs. Employee Drivers**

**Figure 5. Driver Support / Installer Labor Type as a Percent of Total**

**Figure 6. Use of Freight Brokerage over the next 2-3 Years**

**Figure 7. Percent of Total Equipment by Equipment Type**

**Customer Trends and Revenue by Vertical Industry**

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**Figure 9. 3PL Big and Bulky Last-Mile Gross Revenue by Commodity / Industry (\$US Millions) - 2023**

**Figure 10. Average Length of Shipper Relationships**

**Figure 11. Average Last-Mile Delivery Route Costs by State**

**Table 2. Average Route Costs and Stops Per Route by State**

## The Competitive Last-Mile Delivery Landscape

**Figure 12. Select 3PL Last-Mile Delivery Gross Revenues - 2021-2023 (US\$ Millions)**





**Table 3. Additional 3PL Last-Mile Delivery M&A Trends in 2023**

**Table 4. NHDA Last-Mile 3PL Members**

# Market Research

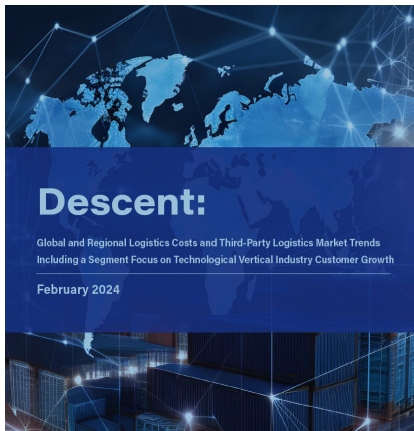
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**Expert Information Service:  
A&A's premium market  
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### [Expert Information Service \(E.I.S.\)](#)

Our premium market research and analysis offering includes access to our eight most popular 3PL market research reports and a subscription to our leading 3PL guide, [Who's Who in Logistics Online](#). Phone consulting is available.



### Descent:

Global and Regional Logistics Costs and Third-Party Logistics Market Trends  
Including a Segment Focus on Technological Vertical Industry Customer Growth

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### **Descent: Global and Regional Logistics Costs and Third-Party Logistics Market Trends Including a Segment Focus on Technological Vertical Industry Customer Growth**

Global Third-Party Logistics Market Gross Revenue by Total and 3PL Segment and Logistics Cost estimates from 2016-2026E with revenues and growth rates broken down by key regions and countries. This year's report has a special segment focus on the Technological vertical customer growth providing vertical and subsegment revenue estimates and growth rates by key region and country. The report also covers the top 50 3PLs, those serving the Technology vertical, and the top 3PL customers within the vertical.

This report is part of A&A's premium market research Expert Information Service (E.I.S.). (Note: This report is downloadable as an Adobe PDF file with a single user license.)



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July 2023

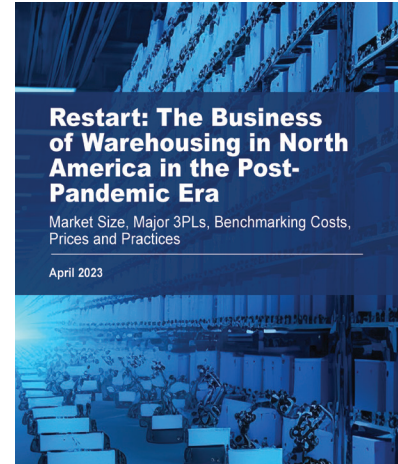


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### **Transition - Soft Landing at a New Level: Latest Third-Party Logistics Market Results and Predictions for 2023**

This definitive analysis explores the latest trends in the third-party logistics industry and its major segments. 2022 results and estimates for 2023 are included, and historical trends and growth by 3PL segment are detailed. A&A's latest Global 3PL market estimates, covering seven major regions comprising 190 countries, are provided within. Total and segment 3PL revenues and logistics spend by country and region are included. The report also contains A&A's lists of the Top 50 Global 3PLs and Top 50 U.S. 3PLs for 2022.

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This major market research report on North American warehousing provides updates on North American Value-Added Warehousing and Distribution (VAWD) market estimates, extensive guidelines for warehouse pricing, capability and technology benchmarks, contract lengths, warehouse sizes, and revenues, operating margins, expected versus actual results, warehouse ownership, primary warehousing handling types, advanced breakdowns of contract warehouses, and more.

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