

Philippines Logistics Market Outlook to 2019 - Growth Driven by Express Delivery, 3PL and E-commerce Logistics Services

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Abstracts

The report titled “Philippines Logistics Market Outlook to 2019 – Growth Driven by Express Delivery, 3PL and E-commerce Logistics Services” provides a comprehensive analysis on the various aspects of the market such as market size of logistics, express delivery, freight forwarding, third party logistics, e-commerce logistics, Balikbayan boxes, third party logistics, warehousing and value added services. The report also covers the major express logistics players in both international and domestic markets along with their share in the revenue.

The Philippines has been one of the fastest growing economies in the ASEAN regions during the past five years. With an improvement in economy which has been facilitated by an increase in trade, the country plans to achieve more than 6% GDP growth rate in the coming years. Variables such as service industry, manufacturing sector, exports and imports along with foreign direct investments and personal disposable income have impacted the logistics market in the Philippines. The growth of gross domestic product from PHP 8,206.1 billion in 2009 to PHP 12,642.7 billion has acted as a strong indication of the growth of Filipino economy. Logistics has formed a crucial part of the Filipino economy with a contribution of around 10% to the GDP in the year 2014. In order to support the rapidly growing logistics sector, the infrastructural expansion in the country has showcased steady progress during the review period of 2009 to 2014.

The domestic express delivery market has been the upcoming segment in the Philippines logistics market. Express delivery which comprises of services for documents, mails, parcels and couriers at a premium price for faster delivery times has gained significant popularity amongst the Filipino population. Companies such as LBC Express, PHL Post, 2GO and Air 21 have been few of the prominent names in the

domestic express delivery market. The domestic express market has witnessed a number of collaborations of domestic companies with international entities. The competition amongst the players has been majorly limited due to the presence of major player who have dominated the industry due to the development of high brand value and a sense of security amongst the Filipinos.

The Philippines has acted as a major gateway for the shipment of goods from western countries to the Asian continent due to its strategic geographic location. As a result of that, the country has become a renowned hub for logistics and freight forwarding activities. This has attracted a large number of international logistics companies to the Philippines. In the year 2014, the revenue generated from the international express delivery market of the Philippines was recorded at USD ~ million. DHL was observed as the major player with a market share of ~% in terms of revenues and was followed by FedEx at ~%. A larger volume of trade has been observed to take place with the availability of international express delivery services.

The Balikbayan box market has been observed to increase from USD ~ million in 2009 to USD ~ million in 2014. Despite of a large number of Filipinos working in foreign nations, this market has grown at a CAGR of ~% in the last 5 years. The competition in the Balikbayan box market has been intensified due to the presence of a large number of players. Growth of online business and e-commerce has impacted the shipments of balikbayan boxes.

The total logistics market recorded transaction volume worth USD ~ million in 2014 which grew from USD ~ million in 2009. The third party logistics market in the Philippines has observed an increase in revenues from USD ~ million in 2009 to USD ~ million in the year 2014 at a compounded annual growth rate of 11.8% during the time period 2009-2014.

The revenue generated in the ecommerce logistics segment of the Philippines logistics industry witnessed an increase from USD ~ million in 2009 to USD ~ million in 2014. Additionally, due to the influx of funds from venture capitalists and heightened competition in the market, companies have shifted to provide cutting edge logistics services to acquire a larger share of the market. It has been expected that the e-commerce logistics will witness a CAGR of ~% during the years 2015-2019.

Road transport has played a key role in handling freight movement in the country. The national road network in 2014 was 31,242.4 km which comprised of ~% of arterial roads and ~% of secondary roads. The overall size of the freight forwarding market in the

Philippines was registered at USD ~ million in the year 2014 with a compounded annual growth rate of ~% during 2009-2014. The steady increase in trade volumes in the past five years has supported the elevation of freight forwarding sector. Despite of the enormous potential and growth in the past five years the domestic freight forwarding business in the Philippines has been plagued by poor infrastructural growth and development.

The logistics market of the Philippines is expected to grow at a brisk rate of ~% from the year 2015 to 2019. Technological advancements as well as competitive pricing pressures have significantly changed the market. The revenues generated in the logistics market are estimated to reach USD ~ million by the year 2019.

Key Topics Covered in the Report:

The market size of the Philippines logistics, domestic express delivery, international express delivery, freight forwarding, warehousing and value added services, third party logistics, e-commerce logistics and cargo handling market.

The market size of the Balikbayan box market.

Market segmentation of the logistics market on the basis of domestic and international market and B2B and B2C customers.

Market segmentation of the express delivery market on the basis of road and air express, international and domestic express.

Market segmentation of the freight forwarding market on the basis of road, sea and air freight.

Trends and Development in the Philippines express delivery and logistics market.

Competitive landscape, service offerings, pricing analysis and market share of major players in the Philippines express delivery market.

Gateway analysis, quality analysis and IT systems in the Philippines express delivery market.

Government regulations and entry barriers in the Philippines logistics market.

Future outlook and projections of the Philippines logistics industry – express delivery, freight forwarding, warehousing and value added services, Balikbayan box market and e-commerce logistics market.

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