

South East Asia Express Delivery Market: Analysis By Destination (Domestic and International), By Application (Business to Consumer and Business to Business), By Region (Indonesia, Thailand, Vietnam, Philippines, Malaysia, Singapore), Size & Forecast with Impact Analysis of COVID-19 and Forecast up to 2029

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Abstracts

Express delivery is the quickest method of shipping. The client pays an additional shipping fee for express delivery as the shipment will be done within 24–72 hours. Express Delivery services are meant for those who have an urgent requirement. They usually promise delivery between one to four hours in the city. For local deliveries on a strict timeline, this can be a good option. In 2023, South East Asia express delivery market by parcel volume stood at 14.94 billion, and is probable to reach 37.99 billion by 2029.

South East Asia express delivery market in terms of parcel volume is driven by strong domestic e-commerce sales. Domestic markets have been growing more quickly than international markets in most regions, but the gap is narrowing significantly in some regions. Also, surge in internet penetration and augmenting economies in South East Asia have led to the growth of express delivery market. The expanding middle class in South East Asia is contributing to increased consumer spending. Followed by, improvement in transportation infrastructure and payment system being the reason for the growth of South East Asia express delivery market. Meanwhile, in 2023, Southeast Asia witnessed an increasing number of investments in the infrastructure sector. For instance, in March 2023, the Asian Infrastructure Investment Bank (AIIB) granted more than US\$120 million to the Seraya Southeast Asia Energy Transition and Digital

Infrastructure Fund (the Fund). Also, South East Asia's participation in global trade has increased, leading to a surge in cross-border e-commerce. This international trade activity fuels the demand for express delivery services for timely shipments across borders. The South East Asia express delivery market by parcel volume is projected to grow at a CAGR of 16.82%, during the forecast period of 2024-2029.

Market Segmentation Analysis:

By Destination: According to the report, South East Asia express delivery market is segmented into two destination: Domestic and International. Domestic segment acquired majority of share in the market in 2023 and is expected to grow with the fastest CAGR, as the region has experienced significant economic growth, leading to an expanding middle class with higher disposable incomes. This demographic often values convenience and is more likely to use express delivery services for the swift receipt of products, which lead to the growth in domestic express delivery market.

By Application: According to the report, South East Asia express delivery market is segmented into two application: Business to Consumer and Business to Business. Business to Consumer segment acquired majority of share in the market in 2023 and is expected to grow with the fastest CAGR, as the exponential growth of e-commerce is a primary driver for the B2C express delivery market. Because consumers increasingly turn to online shopping, there is a higher demand for fast and reliable delivery services to fulfill orders promptly. Thus, leading to the growth of business to consumer segment in South East Asia express delivery market.

By Region: The report provides insight into the South East Asia express delivery market based on the parcel volume, namely Indonesia, Thailand, Vietnam, Philippines, Malaysia, and Singapore. Indonesia express delivery market enjoyed the highest market share in 2023, as developing the country's road infrastructure is one of the most urgent points on the Indonesian government's agenda. This is expected to create new opportunities for logistics firms in the country. The country has strong trade relations with Australia, European countries, the US, and neighboring South East Asian countries such as Thailand and Vietnam. This growth occurred due to the country strongly investing in upgrading its transportation services, being open to collaboration, investments in infrastructure, various developments made by companies, government issuing 13 logistics policies packages, rise in logistics center and elevated e-commerce industry.

Whereas, Singapore express delivery market is expected to grow with the fastest

CAGR, as the government is focusing on sustainable development of the country with the introduction of automated and sustainable products. Sustainable technologies are integral to the new Tuas Port, which will become the world's largest automated container terminal when its fourth and final phase will be completed in 2040.

South East Asia Express Delivery Market Dynamics:

Growth Drivers: Augmenting demand from e-commerce plays a pivotal role in driving growth in the South East Asia express delivery market as more consumers in South East Asia turn to online platforms to make purchases, the need for efficient and timely delivery services has grown substantially. Partnerships between e-commerce platforms and express delivery providers are becoming more common, leading to the development of more efficient and extensive delivery networks. Further, the market is expected to increase due to expanding into fast-growing new markets, surging economy, rapid urbanization, improvement in transportation infrastructure and payment system, favorable policies, etc.

Challenges: The market's expansion is projected to be hampered by lack of infrastructure, as underdeveloped transport infrastructure, ambiguous location identification and language barriers require sophisticated address digitalization system to improve the accuracy and timeless deliveries. Underdeveloped infrastructure often leads to limited road, rail, and air connectivity between different regions. This lack of connectivity can result in delays, increased transit times, and higher operational costs for express delivery services. The other challenges that express delivery market faces include excess licensing and regulatory, higher operational costs, etc.

Trends: One of the most distinct and pervasive trends observed in South East Asia express delivery market is sustainable delivery option. Sustainable delivery options are gaining momentum globally, and Southeast Asia is no exception. As environmental concerns become more prominent, businesses in the express delivery market are increasingly focusing on sustainable practices. Various sustainable delivery options include, Electric Vehicles (EV's), Bicycles and Electric Bikes, Packaging Innovation, Training and Skill Development, etc. More trends in the market are believed to augment the growth of express delivery market during the forecasted period include, rising digital financial services (DFS), AI techniques for route optimization, international cross-border trade activities, robotics, drones and autonomous vehicles, etc.

Impact Analysis of COVID-19 and Way Forward:

The impact of COVID-19 was negative towards South East Asia express delivery market. The outbreak of COVID-19 resulted in flight cancellations, travel bans, and quarantines, which led to massive slowing of express delivery service activities across the world. Although the pandemic has accelerated the decline of letters & document parcel and growth of e-commerce parcels due to an increased number of people shopping from home. The pandemic exposed vulnerabilities in global and regional supply chains. Express delivery companies had to adapt to disruptions in transportation, logistics, and inventory management to maintain their services. The impact on the express market varied across industries.

Competitive Landscape and Recent Developments:

The South East Asia express delivery market is fragmented. South East Asia express delivery with a five major players obtaining around half of the market. Key players of the South East Asia express delivery market are:

Pos Malaysia Berhad
DHL eCommerce
Singapore Post
J&T Express
Thailand Post
JNE Express
Kerry Express
Sicepat Express
Ninja Van
Pickupp Flash Express
DPEX Worldwide
uParcel

J&T Global was the largest express delivery operator in Southeast Asia (SEA) by parcel volume, with market share of more than 20%. J&T has strategically expanded into new markets, including Saudi Arabia, UAE, Mexico, Brazil and Egypt since 2022.

The key players are constantly investing in strategic initiatives, such as new launches, mergers & acquisitions, introducing their products to emerging markets and more, to maintain a competitive edge in this market. For instance, in November 2023, Pos Malaysia Berhad had launched its second Pos Shop convenience store, strategically located in the heart of the vibrant Brickfields community in Kuala Lumpur. Also, in January 2024, DHL Global Forwarding partnered with Schneider Electric, the provider in

the digital transformation of energy management and automation, to design and launch an industry-first multi-modal shipping model, using sustainable aviation fuels (SAFs) to help improve the agility and reduce the environmental impact of its supply chain.

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