

Asia Pacific Same Day Delivery - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2024 - 2030)

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Abstracts

The Asia Pacific Same Day Delivery Market size is estimated at 41.42 billion USD in 2024, and is expected to reach 67.06 billion USD by 2030, growing at a CAGR of 8.36% during the forecast period (2024-2030).

The same day delivery market is growing due to increasing demand for the delivery of goods like medicines and groceries, coupled with technological advancements

In 2022, the total volume of express deliveries accounted for about 80% of China's postal industry's delivery business total volume, the majority being same day deliveries. Same day deliveries have moved from being a valuable differentiator to a prerequisite for most platforms in Japan. Amazon and Rakuten offer this service to most of Japan's population through their extensive logistics networks. For instance, Rakuten, Japan's domestic e-commerce giant, has a network of 49,000 shops that help fulfill same day deliveries. Amazon provides same day delivery to 80% of Japanese customers as of 2023.

Same day delivery services were expanded to 15 cities in India in 2022, mainly for D2C brands to be able to deliver their orders on the same day. Orders placed till 3 p.m. were also guaranteed same day delivery via established SKU (Stock Keeping Unit) partnerships. The same day delivery market in Indonesia is projected to amount to 4.5 million parcels a day in 2023. The expected growth is largely to be generated from instant groceries and medical supply delivery services.

Same day delivery in Australia is expected to grow largely due to required technological advancements for the service, starting in the eastern seaboard where 80% of the nation's population resides. Capitalizing on these opportunities and taking first mover advantages, Sherpa, the country's largest same day delivery provider by volume completed more than 7 million same day deliveries via a national fleet of more than 11,000 drivers and a network across 21 Australian cities within a decade as of 2022. Other players in the market are also venturing into providing same day delivery service due to increasing demand.

Autonomous warehouse robots, drone deliveries, and express air cargo services facilitating same day deliveries

The growing trend toward same day deliveries in the region has been driven by growth in e-commerce, which registered a CAGR of 24.47% during 2017-2022, as well as rise in online shoppers who prefer faster deliveries. Several countries in the region are consistently working toward facilitating same day deliveries to consumers. For instance, in China, in 2018, Cainiao, the logistics arm of Alibaba, launched an automated warehouse in the country with over 700 robots to facilitate same day deliveries in the country.

In India, with digital buyers anticipated to reach 378 million by 2025, same day deliveries are the most preferred choice among consumers. Amazon introduced the Same Day Delivery service in India in 2017 to facilitate faster and swift deliveries. The e-commerce giant established specialized buildings optimized for faster click-to-delivery speeds and are located in different parts of several cities throughout the country. In Japan, players like Yusen Logistics, DHL, Kokusai Express Japan, and Nippon Express provide same day delivery through their express air cargo services. In 2022, DHL announced a USD 150 million investment in warehouse robotic solutions, with the deployment of 1,000 robots by 2025 and automation at its Australian warehouses for faster deliveries.

In 2018, DHL announced the launch of DHL Parcel Metro Same Day in Ho Chi Minh City and Hanoi to offer same day delivery to consumers in both cities, with real-time tracking and rescheduling of deliveries through DHL's digital platform. Also, in 2021, SignPost partnered with Airbus Helicopters for pilot trials of drone parcel delivery, facilitating same day deliveries nationwide. Further, in 2023, DHL Express expanded its fleet of electric vehicles (EV's) to 18 EVs in the Philippines.

Asia Pacific Same Day Delivery Market Trends

Asia-Pacific's Plan Aims to Tackle Soaring Freight Demand, Anticipates Tripled Transport Needs by 2050

The region's new Regional Action Programme (RAP) addresses issues like increasing freight and passenger volumes and reflecting the rising demand for freight transport and mobility. Two-thirds of global seaborne trade is concentrated in the Asia-Pacific region, which is also home to nine of the world's busiest container ports. The region is responsible for more than 40% of the global surface freight transport flows, and by 2050, the region's demand for freight transport is projected to triple.

Full-year new logistics supply for Asia-Pacific is expected to reach 167 million sq. ft in 2022, 58% higher than the previous three-year average. The logistics and warehousing sector is undergoing significant changes with increased mergers and acquisitions. Both innovation and sustainability are key factors for the sector, where shorter turnaround times and efficiency in operations are in demand. In 2021, the Suez Canal blockage and new waves of COVID-19 infections constrained manufacturing capacity in India, Thailand, Vietnam, and Indonesia.

International freight transport remained largely operational throughout the pandemic as countries implemented policy measures to preserve freight transport connectivity to support supply chains. The Asian Highway, Trans-Asian Railway, and dry port networks established under ESCAP auspices serve as the backbone for the region's land transport infrastructure connectivity and logistics. They are also increasingly integrated with inter-regional transport corridors and port and shipping networks. In 2020 and 2021, these links brought countries together to capture and analyze their responses to the pandemic and the impacts of those actions on regional connectivity.

Crude oil prices are soaring in the Asian economies owing to global uncertainties

Crude oil reached USD 130 per barrel in March 2022, its highest level since 2008, before retreating to USD 100 per barrel in April of the same year. The factors behind the rise include protracted low investment in global oil production, a decline in the global inventory, and a rise in the demand related to economic recovery from the COVID-19 pandemic. Though the overall economic impact has been modest in Asia-Pacific, the

situation can change quickly, subject to the magnitude and duration of oil price increases. Crude oil prices may overshoot, like many commodity and financial prices.

Due to a strong economic recovery in Asia, oil prices surpassed USD 80 in November 2021, more than double the price in 2020. The price may increase further due to global geopolitical uncertainties and tight supply conditions. Reaching USD 200 is not so farfetched considering that the historic high of USD 140 oil in 2008 translates to over USD 180 in current dollars. Higher oil prices are often economically damaging for net oil importers, impacting real income and hurting growth. Most regional economies are net oil importers except for a few oil exporters, such as Brunei, Malaysia, and Vietnam.

For the short term, the region must prioritize the rising oil prices and global interest rates and maintain a stable macroeconomic environment of low inflation and prudent fiscal balances. The average price of gasoline around the world remains at USD 116.94 per liter. The price of petrol stands at USD 1.16 per liter in India, USD 0.93 per liter in China, and USD 1.002 per liter in Pakistan. The differences in prices across countries are due to the various taxes and subsidies for gasoline.

Asia Pacific Same Day Delivery Industry Overview

The Asia Pacific Same Day Delivery Market is fragmented, with the top five companies occupying 23.55%. The major players in this market are China Post, DHL Group, SF Express (KEX-SF), Yamato Holdings and YTO Express (sorted alphabetically).

Additional Benefits:

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