

# Japan Courier, Express, and Parcel (CEP) - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2024 - 2030)

<https://marketpublishers.com/r/J778356B3432EN.html>

Date: July 2024

Pages: 298

Price: US\$ 4,750.00 (Single User License)

ID: J778356B3432EN

## Abstracts

The Japan Courier, Express, and Parcel (CEP) Market size is estimated at 33.85 billion USD in 2024, and is expected to reach 44.55 billion USD by 2030, growing at a CAGR of 4.68% during the forecast period (2024-2030).

The e-commerce industry is driving the segmental demand in Japan

Domestic and cross-border e-commerce is a major driver of the demand for courier, express, and parcel in the country. The e-commerce market was valued at USD 145 billion in 2022, leading to growth in CEP volume. Post re-opening of the economy, overall CEP demand in the country increased. The domestic and international CEP volume grew in 2022 despite the presence of an aging workforce in the country, along with labor shortages. The redelivery of parcels significantly contributed to the growth of the CEP market. For instance, approximately 11.8% of parcels shipped by major door-to-door delivery services in Japan had to be redelivered in October 2022, increasing from 11.7% in April 2022. By 2024, the revenue in the e-commerce industry is expected to reach USD 176 billion, driven by high internet user penetration.

As of 2020, the domestic parcels handled by post offices alone reached 4390.1 million, a decline from 4543.1 million handled in 2020. Furthermore, in 2020, international parcels sent from post offices reached 2.5 million, a decline from 2.8 million in 2020. This showed that the presence of foreign courier companies had started gathering a larger market share.

E-commerce, led by the fashion category with a 25% revenue contribution and the electronics category with a 19% revenue, contributed to the CEP market in 2020, owing to the COVID-19 pandemic. Government-imposed restrictions to curtail the spread of the virus and the work-from-home scenario led to the popularity of the online delivery method. E-commerce is projected to reach USD 225 billion by 2027, significantly increasing demand for the CEP market.

## Japan Courier, Express, and Parcel (CEP) Market Trends

With growing demand for home deliveries & labour shortages, the MILT is focusing on construction of automatic cargo transport roads and logistics tunnels

The transportation and storage sector has captured a significant percentage of GDP over the review period. The country still leads in Southeast Asian infrastructure investment with total construction investment reaching JPY 68.8 trillion (USD 521.63 billion) as of 2022. Moreover, Ministry of Land, Infrastructure, Transport and Tourism (MILT) published an interim draft in October 2023, with a focus on developing a dedicated road for automatic cargo transportation. Owing to rising home delivery demands and labour shortages, the country is further aiming to build a system where self-driving carts run through underground tunnels dedicated to logistics.

The transportation and storage sector in Japan saw a significant increase, rising from 0.57% YoY growth in 2021 to 4.94% YoY in 2022. This was primarily due to technological innovations in transportation and logistics and investments in automation, artificial intelligence, and robotics, which enhanced the efficiency of logistics operations, reducing costs and improving service quality. Japan relies heavily on a robust logistics industry, driven by its sizable manufacturing sector and the resulting need for efficient goods storage and distribution—consequently, shipping firms like Yamato Holdings rank among the world's top logistics companies. In 2021, Japan handled approximately 4.71 billion tons of domestic freight and an additional 900 million tons of cargo through foreign trade.

In 2021, the trade in digital commodities, including integrated circuits and related semiconductor items, experienced a notable 21.3% increase compared to the previous year, reaching a substantial value of USD 4.34 trillion. The trade of electrical and electronic goods like computers and peripheral equipment also drove the growth.

Japan's government extended the gasoline subsidy program till 2023 year-end in response to concerns that gasoline prices will rise if the subsidy program is terminated

As of December 2021, the monthly average domestic retail price of diesel fuel in Japan stood at around USD 1.06 per liter, a decrease from USD 0.95 in December 2020. The average diesel price during the Q1 of 2022 was USD 1.07, with a minimum of USD 1.04 in May 2022 and a maximum of USD 1.09 in June 2022. In comparison, the average price of diesel in the world for this period was USD 1.93 per liter.

The surge in crude oil prices over the past few months raised concerns regarding increasing inflation and stirred uncertainty in the global economy. Japan requested producer nations to increase their output and launched a temporary subsidy program in January 2022. It has since raised twice the amount to hit a cap of JPY 50 (USD 0.37) per liter. Japan's average retail gasoline price reached its highest level in seven years in 2022, reflecting a global surge in crude oil prices. The average price for regular gasoline was USD 1.4 per liter in Q2 2022, reaching its highest level since October 2014 and indicating an increase of 25 cents (USD 0.25) from October 2021.

Gasoline and crude oil prices are expected to remain high and influence retail prices due to increasing inflation and economic uncertainty globally. A weak Yen and a gradual reduction in government subsidies have led to record-high prices of regular gasoline across Japan. The average gasoline price at the nation's gasoline stands was JPY 185.6 (USD 1.27) per liter in 2022. Since June 2023, the government has gradually reduced the subsidy rate, which stands at 30%, to terminate the program at the end of September, as the crude oil market has regained calm. Japan extended the year-end gasoline subsidy program in response to concerns that gasoline prices will rise if the subsidy program is terminated.

## Japan Courier, Express, and Parcel (CEP) Industry Overview

The Japan Courier, Express, and Parcel (CEP) Market is fairly consolidated, with the top five companies occupying 74.09%. The major players in this market are Japan Post Holdings Co., Ltd., Seino Holdings Co., Ltd., SG Holdings Co., Ltd., United Parcel Service of America, Inc. (UPS) and Yamato Holdings (sorted alphabetically).

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## Contents

### **1 EXECUTIVE SUMMARY & KEY FINDINGS**

### **2 REPORT OFFERS**

### **3 INTRODUCTION**

3.1 Study Assumptions & Market Definition

3.2 Scope of the Study?

3.3 Research Methodology

### **4 KEY INDUSTRY TRENDS**

4.1 Demographics

4.2 GDP Distribution By Economic Activity

4.3 GDP Growth By Economic Activity

4.4 Inflation

4.5 Economic Performance And Profile

4.5.1 Trends in E-Commerce Industry

4.5.2 Trends in Manufacturing Industry

4.6 Transport And Storage Sector GDP

4.7 Export Trends

4.8 Import Trends

4.9 Fuel Price

4.10 Logistics Performance

4.11 Infrastructure

4.12 Regulatory Framework

4.12.1 Japan

4.13 Value Chain & Distribution Channel Analysis

### **5 MARKET SEGMENTATION (INCLUDES MARKET VALUE IN USD, FORECASTS UP TO 2030 AND ANALYSIS OF GROWTH PROSPECTS)**

5.1 Destination

5.1.1 Domestic

5.1.2 International

5.2 Speed Of Delivery

5.2.1 Express

- 5.2.2 Non-Express
- 5.3 Model
  - 5.3.1 Business-to-Business (B2B)
  - 5.3.2 Business-to-Consumer (B2C)
  - 5.3.3 Consumer-to-Consumer (C2C)
- 5.4 Shipment Weight
  - 5.4.1 Heavy Weight Shipments
  - 5.4.2 Light Weight Shipments
  - 5.4.3 Medium Weight Shipments
- 5.5 Mode Of Transport
  - 5.5.1 Air
  - 5.5.2 Road
  - 5.5.3 Others
- 5.6 End User Industry
  - 5.6.1 E-Commerce
  - 5.6.2 Financial Services (BFSI)
  - 5.6.3 Healthcare
  - 5.6.4 Manufacturing
  - 5.6.5 Primary Industry
  - 5.6.6 Wholesale and Retail Trade (Offline)
  - 5.6.7 Others

## **6 COMPETITIVE LANDSCAPE**

- 6.1 Key Strategic Moves
- 6.2 Market Share Analysis
- 6.3 Company Landscape
- 6.4 Company Profiles
  - 6.4.1 DHL Group
  - 6.4.2 Ecohai
  - 6.4.3 FedEx
  - 6.4.4 Japan Post Holdings Co., Ltd.
  - 6.4.5 Nippon Express Holdings
  - 6.4.6 Seino Holdings Co., Ltd.
  - 6.4.7 SG Holdings Co., Ltd.
  - 6.4.8 United Parcel Service of America, Inc. (UPS)
  - 6.4.9 Yamato Holdings

## **7 KEY STRATEGIC QUESTIONS FOR CEP CEOS**

## **8 APPENDIX**

### 8.1 Global Overview

#### 8.1.1 Overview

#### 8.1.2 Porter's Five Forces Framework

#### 8.1.3 Global Value Chain Analysis

#### 8.1.4 Market Dynamics (DROs)

#### 8.1.5 Technological Advancements

### 8.2 Sources & References

### 8.3 List of Tables & Figures

### 8.4 Primary Insights

### 8.5 Data Pack

### 8.6 Glossary of Terms

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