

Japan E-commerce Logistics - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2024 - 2029)

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Abstracts

The Japan E-commerce Logistics Market size is estimated at USD 22.42 billion in 2024, and is expected to reach USD 27.91 billion by 2029, growing at a CAGR of 4.95% during the forecast period (2024-2029).

The e-commerce industry in Japan has witnessed remarkable growth in recent years. With a tech-savvy population and a strong digital infrastructure, Japan has become a major player in the global e-commerce market. Consequently, the demand for efficient and reliable logistics services has also surged.

One of the key factors driving the growth of e-commerce in Japan is the increasing penetration of the Internet and smartphones. Japan's mobile internet penetration was about 93.8% in 2023 and is expected to reach nearly 95.6% by 2028. Japan's population is projected to decline from approximately 123.6 m in 2023 to approximately 122.1 m in 2028.

This shift in consumer behavior has created immense opportunities for e-commerce businesses but has also posed challenges for logistics providers.

To meet the demand of the booming e-commerce market, logistics companies in Japan have been investing heavily in technology and infrastructure. They adopt advanced sorting facilities and real-time tracking systems to ensure efficient order processing and delivery.

Sagawa Express, a Japanese logistics and delivery service provider, has partnered with Sumitomo Corporation, a subsidiary of SG Holdings Co. Ltd, and Dexterity Inc., a

subsidiary of Dexterity, to power robots powered by Artificial Intelligence (AI) that can load parcel trucks with random boxes. Sagawa Express and Dexterity, one of the world's leading logistics and delivery services providers, will use Dexterity's AI to power robots that can load trucks with boxes. Before scaling deployment, the DexR's dual-arm robot learns from Sagawa Express's logistics operations, seamlessly integrating into Sagawa's existing logistics infrastructure.

Last-mile delivery has been a particular focus for logistics providers in Japan. The country's dense urban areas and complex address systems make last-mile delivery challenging. However, companies have been leveraging innovative solutions to overcome these challenges. For instance, they are utilizing crowdsourced delivery networks, partnering with local convenience stores for parcel pick-up, and exploring using drones and autonomous vehicles for delivery in certain areas.

For example, Amazon offers last-mile delivery on a wide range of products in major cities such as Tokyo, Osaka, and Nagoya. The company has invested heavily in logistics infrastructure in Japan, including building new warehouses and delivery centers.

Japan Post offers a same-day delivery service called Yu-Pack Tokkyu. This service is available nationwide and can be used to deliver packages weighing up to 25 kilograms. The growing infrastructure in Japan is making it possible for same-day delivery companies to operate more efficiently and effectively. This is helping to drive the growth of the same-day delivery market in Japan.

Japan E-commerce Logistics Market Trends

Immense growth projection for transportation segment

In Japan, the transportation segment has seen significant advancements to meet the growing demand of the booming e-commerce market.

Japan's e-commerce transportation segment is dominated by three giant companies that account for more than 90 percent of the domestic parcel delivery market. The biggest one, Yamato Transport, ships more than 1.8 billion parcels annually. A close competitor, Sagawa Express, supplies logistics services to major customers such as Amazon.

One of the key challenges in the transportation segment is the efficient and timely

delivery of goods. Logistics companies in a highly populated and geographically diverse country like Japan have had to develop innovative solutions to overcome these challenges. Japan has a population of 122,895,594 as of 2024, according to Worldometer's analysis of the most recent United Nations data.

Japan Post, the country's third-largest domestic post organization, is likely to follow suit by raising its basic delivery charge and negotiating more competitive rates with key customers. Japan Post has also taken advantage of the domestic shipment management opportunities left by Yamato and Sagawa following the restriction strategy. It has seen tremendous growth in its parcel delivery service, 'Yupack,' which was previously available only to enterprise businesses and is now available to private individuals.

However, while the ever-growing demand of nearly 4 billion package deliveries is driving growth in the industry overall, the sheer volume of items that require delivery within Japan is putting pressure on these companies and forcing them all to look for cost savings and process improvements.

High internet and smart phone penetration driving the market

Japan has witnessed remarkable growth in internet and smartphone penetration over the years, making it one of the most connected countries in the world. With its advanced technological infrastructure and tech-savvy population, Japan has embraced the digital revolution with open arms.

Internet penetration in Japan has soared to impressive levels, with a significant portion of the population having access to the internet. As of the latest data, the internet penetration rate in Japan stands at around 93.13%. This means that majority of the Japanese citizens can connect to the internet and enjoy its vast array of services and opportunities.

Japan had 92.9 million active social media users at the beginning of 2023, making up 74.4% of the country's population. At the start of 2023, there were 184.4m cellular mobile connections in the country, making up 149.1% of the population.

One of the driving forces behind Japan's high internet penetration is its robust telecommunications infrastructure. The country boasts a well-developed network of fiber-

optic cables, providing high-speed and reliable internet connections to both urban and rural areas. This extensive network ensures that people across the country can access the internet with ease.

The rise in ecommerce in Japan has led to an increased demand for efficient and reliable logistics services. As more and more people turn to online shopping, the need for seamless delivery and fulfillment becomes crucial. This has paved the way for the evolution of the ecommerce logistics market in Japan.

Japan E-commerce Logistics Industry Overview

The e-commerce logistics market in Japan is quite dynamic and competitive, with several key players vying for market share. Some of the major players in the market include Yamato Holdings, Sagawa, Japan Post, Amazon Japan, and Rakuten.

There are also numerous smaller logistics companies and startups that are making their mark in the industry. The competition in the market is intense, with companies constantly innovating and expanding their services to meet the evolving needs of the e-commerce sector.

Amazon.com's cloud computing infrastructure, which is the backbone for AI services, is set to expand significantly in Japan. By 2027, Amazon.com plans to invest USD 2.26 billion in cloud computing facilities in the Tokyo and Osaka metropolitan areas to meet the increasing demand from customers.

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