

Vietnam Cross-border Logistics Industry Research Report 2025-2034

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Abstracts

Cross-border logistics encompasses the entire process of transporting, warehousing, customs declaration, customs clearance, and distribution of goods between different countries or regions. It is a crucial support system for cross-border e-commerce and international trade. Its core processes include overseas collection, export customs declaration and transportation, import customs clearance, overseas warehousing, and last-mile delivery. Based on different fulfillment models, cross-border logistics can be categorized into postal parcels, commercial express delivery, cross-border dedicated lines, overseas warehouses, and consolidated customs clearance.

Cross-border logistics involves e-commerce platforms, logistics service providers, overseas warehouse operators, and customs clearance agents. Cross-border logistics is widely used in e-commerce exports, OEM manufacturing, international B2B transactions, and direct brand sales. With the globalization of e-commerce, cross-border logistics is showing trends toward intelligentization, green development, localization, and regional collaboration. For example, using overseas warehouses can significantly improve delivery times and mitigate peak customs clearance costs.

The cross-border logistics industry chain encompasses the entire process from shipment source to final delivery. It can be broadly divided into three main segments: upstream, midstream, and downstream. According to CRI analysis, the upstream segment primarily includes e-commerce sellers, manufacturers, e-commerce platforms, and logistics system service providers, responsible for order initiation, product stocking, and logistics information coordination.

The midstream segment, the core of the industry chain, encompasses collection and delivery, export customs declaration, international transportation, import customs

clearance, and overseas warehousing. Trunk transportation options are diverse, including sea, air, and land transport, as well as dedicated cross-border lines. Overseas warehouses and bonded warehouses play a key role in expediting fulfillment and pre-positioning inventory. The downstream links include local distribution, reverse logistics and after-sales services, and the "last mile" delivery and return management are mainly completed by local express companies and third-party logistics companies.

In recent years, global cross-border logistics market demand has maintained steady growth. According to CRI analysis, this growth is primarily driven by multiple factors, including the rapid expansion of cross-border e-commerce, the restructuring of global supply chains, and the promotion of regional trade agreements. With the rapid expansion of e-commerce platforms' international business, a large number of small and medium-sized businesses and brands are exporting their products overseas through cross-border channels, driving a rapid increase in demand for small-volume, high-frequency, and multi-category logistics. Furthermore, B2B cross-border trade continues to generate demand amidst the shift in manufacturing and the diversification of supply chains.

Vietnam's cross-border logistics market is experiencing rapid growth, with the market size continuing to expand. According to CRI analysis, the main drivers of Vietnam's rapid cross-border logistics development include robust growth in cross-border e-commerce, government support policies, and improved infrastructure. Statistics show that Vietnam's e-commerce growth rate ranks among the top ten fastest-growing countries globally, and by 2023, Vietnam's e-commerce GMV (gross merchandise volume) will reach US\$20.5 billion, with cross-border e-commerce experiencing a year-on-year growth rate of 28.5%. On the infrastructure front, the Vietnamese government is accelerating the development of logistics parks, bonded warehouses, and economic zones to support the growth of cross-border logistics.

According to CRI analysis, Vietnam's cross-border logistics sector is rapidly evolving, driven by policy initiatives, infrastructure upgrades, and technological investment by businesses. From an overall structural perspective, local logistics companies are numerous but relatively small in scale. Leading companies, such as SPX, GHN, GHTK, and Viettel Post, dominate cross-border business and are gradually expanding their overseas collection, customs clearance, and local delivery capabilities. Furthermore, infrastructure and intermodal transport are improving. Vietnam is actively improving its logistics network, vigorously promoting the development of highways, railway crossings, seaports, and airports.

CRI predicts that with the rapid development of Vietnam's export-oriented manufacturing and cross-border e-commerce in the coming years, Vietnam's cross-border logistics industry will usher in even greater growth.

CRI recommends that global cross-border logistics service providers, third-party logistics platforms, overseas warehouse operators, and investment companies promptly research the Vietnamese market and prepare for their presence there. CRI's offices in Shanghai, China, and Hanoi, Vietnam, will assist foreign companies in entering Vietnam's cross-border logistics market.

Topics covered:

Overview of the Cross-border Logistics Industry in Vietnam

The Economic and Policy Environment of Cross-border Logistics Industry in Vietnam

The Market Size of Cross-border Logistics Industry in Vietnam (2025-2034)

Analysis of Major Cross-border Logistics Industry Companies in Vietnam

Main Driving Forces and Market Opportunities of Cross-border Logistics Industry in Vietnam

What are the main driving forces, challenges and opportunities of Cross-border Logistics industry in Vietnam during the forecast period of 2025-2034?

Which companies are the main players in Vietnam's Cross-border Logistics industry market and what are their competitive advantages?

What is the expected revenue of Vietnam's Cross-border Logistics industry market during the forecast period of 2025-2034?

Which part of Vietnam's Cross-border Logistics industry market is expected to dominate the market in 2034?

What are the main disadvantages facing Vietnam's Cross-border Logistics industry?

How can foreign capital enter Vietnam's Cross-border Logistics industry?

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