

Vietnam E-commerce Logistics Industry Research Report 2025-2034

<https://marketpublishers.com/r/VCC2FEEEE6BC6EN.html>

Date: September 2025

Pages: 80

Price: US\$ 3,600.00 (Single User License)

ID: VCC2FEEEE6BC6EN

Abstracts

E-commerce logistics is the critical infrastructure supporting the development of e-commerce, encompassing multiple processes including order processing, warehousing management, picking and packaging, transportation and delivery, and reverse logistics. It is characterized by high frequency, small batches, strong timeliness, and high service quality. With the rapid development of e-commerce, e-commerce logistics has gradually diversified into platforms-owned logistics, third-party logistics, crowdsourcing logistics, and cross-border logistics, meeting the needs of diverse e-commerce business models.

The e-commerce logistics industry's supply chain encompasses a complete closed loop, from upstream infrastructure construction and equipment manufacturing to midstream logistics service execution and downstream e-commerce platforms and consumer services. CRI analysis shows that the upstream sector primarily includes the construction of infrastructure such as automated warehouses, forward warehouses, and distribution centers, as well as the manufacturing of logistics equipment such as intelligent sorting systems, storage racks, and unmanned delivery vehicles. It also involves the R&D and integration services of information systems such as OMS.

The midstream segment is the core of e-commerce logistics operations, encompassing warehousing and sorting, trunk transportation, final delivery, and reverse logistics. Trunk transportation efficiently delivers goods from warehouses to distribution centers via various modes, including land, air, and sea freight. Final delivery is completed through couriers, crowdsourced riders, and self-collection. The downstream segment connects e-commerce platforms, brand merchants, and end consumers, meeting their high demands for delivery timeliness, visual tracking, and service quality.

The global e-commerce logistics market has experienced rapid growth in recent years.

According to CRI analysis, this growth is primarily driven by factors such as the continued rise in global online retail penetration, consumers' high demand for delivery timeliness, the rise of cross-border e-commerce, and the intelligent upgrading of logistics technology. With increasing internet penetration and expanding middle-class consumption, the Asia-Pacific region has become the world's largest e-commerce logistics market, accounting for over 35% of the market share. North America and Europe continue to lead in automation, green logistics, and cross-border delivery.

Vietnam's e-commerce logistics market is in a period of rapid expansion, with market demand growing significantly. Public data shows that the number of e-commerce packages in Vietnam has climbed at a compound annual growth rate of approximately 39% since 2018. According to CRI analysis, the main factors driving the rapid expansion of e-commerce logistics demand include: increased online retail penetration, the development of cross-border e-commerce, and accelerated urbanization. E-commerce platforms are constantly launching logistics subsidiaries, such as Lazada Express and SPX Express, the latter of which has a compound annual growth rate of 200% from 2020 to 2023.

According to CRI analysis, Vietnam's e-commerce logistics supply chain is experiencing a diversified, technology-driven development trend. Platforms, third-party logistics providers (3PLs), and local and international logistics companies coexist. Lazada, Shopee, and Tiki are deploying local forward warehouses and introducing robotics and automated sorting technologies. Meanwhile, local third-party logistics providers like GHN and GHTK, as well as emerging express delivery companies like SPX Express, are experiencing rapid growth. Furthermore, automation and digitalization are accelerating efficiency improvements. Platforms and logistics companies are extensively adopting intelligent systems, including warehouse management systems (WMS), customer management systems (TMS), route optimization, and real-time monitoring technologies.

CRI predicts that with the rapid growth of e-commerce in Vietnam over the next few years, Vietnam's e-commerce logistics industry will usher in even greater development opportunities. CRI recommends that global logistics companies, third-party logistics platforms, and investment companies promptly research the Vietnamese market and prepare for expansion into the country's e-commerce logistics market. CRI's offices in Shanghai, China, and Hanoi, Vietnam, will assist foreign companies in entering Vietnam's e-commerce logistics market.

Topics covered:

Overview of the E-commerce Logistics Industry in Vietnam

The Economic and Policy Environment of E-commerce Logistics Industry in Vietnam

The Market Size of E-commerce Logistics Industry in Vietnam (2025-2034)

Analysis of Major E-commerce Logistics Industry Manufacturers in Vietnam

Main Driving Forces and Market Opportunities of E-commerce Logistics Industry in Vietnam

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

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

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

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

What are the main disadvantages facing Vietnam's E-commerce Logistics industry?

How can foreign capital enter Vietnam's E-commerce Logistics industry?

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