

## **Japan International Courier, Express, and Parcel (Cep) Market - Growth, Trends, Covid-19 Impact, and Forecasts (2023 - 2028)**

Market Report | 2023-01-23 | 120 pages | Mordor Intelligence

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### **Report description:**

The Japanese international courier, express, and parcel (CEP) market is estimated to record a CAGR of more than 5.1% during the forecast period. Japan is among the most developed e-commerce markets after China. Over the last five years, the market has grown steadily due to strong mobile and online penetration and rising customer trust in online transactions. In 2022, the country will have 118.3 million internet users, i.e., more than 94% of the total population using the internet.

The COVID-19 pandemic spurred the rise of e-commerce even more. Some production lines at domestic factories were temporarily halted because of the suspension of operations at these production bases and the delay in the supply of intermediate goods to the Japanese manufacturing industry. Japan's heavy reliance on China makes it more susceptible to any changes in the Chinese market.

In August 2021, household spending in Japan declined more drastically than predicted, as state-of-emergency restrictions to battle the pandemic weighed on consumption over the summer holiday season, jeopardizing the economy's recovery. The rise of COVID-19 infections and the resulting limitations across the country hampered consumption in restaurants and a wide range of commodities, from clothing to furniture. According to an industry report, supply chain concerns began to impair private consumption.

According to industry data, consumers are gradually transferring from offline to online, and the Japanese e-commerce market was estimated to rise by 10.5% in 2021. Online shopping for product sales grew by 21.7% in 2020, while parcel delivery (trucks) grew by 11.5%. After the United Kingdom, China, and the United States, Japan is the world's fourth-largest e-commerce market. E-commerce is growing at a rate of about 6.24% in the market. According to a recent report from the Ministry of Internal Affairs and Communications, online expenditures and services of Japanese buyers increased by 13.7% from January 2018 to January

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2020, with households buying online jumping from 36.3% to 42.8%.

## Japan International Courier, Express, & Parcel (CEP) Market Trends

### Growth in Cross Border E-commerce

While Japanese buyers are not particularly strong cross-border shoppers, the number is growing year after year, and the market was estimated to be worth JPY 308 billion (USD 2.83 billion) in 2021, up by 19.84% in four years. Cross-border purchases of specialized goods peculiar to a country, such as Swiss watches or French wines, are popular among Japanese customers.

According to an industry report, 45.5% of e-commerce enterprises use cross-border e-commerce from Japan to other countries. Furthermore, 65.0% of businesses use e-commerce for international sales. More than 47% of small and medium-sized businesses (SMEs) used cross-border e-commerce compared to major corporations (34.8%). Regarding shipping options for foreign e-commerce sales, "sell on own domestic websites" is the most preferred alternative (35.4%). In terms of e-commerce sale destinations, China is the most popular (47.6%), followed by the United States (36.6%) and Taiwan (28.8%).

Japan is a strong e-commerce and m-commerce market with a digitally literate population that is increasing cross-border buying. It is a market suited for cross-border e-commerce firms. Cross-border e-commerce firms will succeed in the market if they effectively localize the experience, including authentic and correct language translation, website design, product listings, and excellent customer service.

### Increase in Volume of Parcel Shipments in Japan

The number of parcels handled by door-to-door delivery services in Japan set a new high of 4.84 billion shipments in 2020. This market is dominated by three service providers that account for more than 90% of all traffic. On a volume basis, Japan Post had a market share of 48%. On a sales basis, Japan Post had a market share of 32%. In 2020, all major package carriers in Japan (courier and mail) reported an increase in sales.

According to data from the Ministry of Land, Infrastructure, Transport, and Tourism, total courier and mail service shipment volume climbed by 1% Y-o-Y, while courier service alone increased by 12% Y-o-Y. As the need for B2C e-commerce grows, the importance of last-mile logistics is rising in Japan. In recent years, the last mile industry has seen a considerable increase due to rising demand for speed of delivery and increased internet penetration, which resulted in a higher number of regions engaged online.

In 2022, about 48.2% of Japanese families with two or more individuals bought goods or services online, a new high within the recent decade. In recent years, the number of households using e-commerce services has continuously increased, with leisure-related items and services being popular online purchases.

### Japan International Courier, Express, & Parcel (CEP) Market Competitor Analysis

The Japanese international CEP market is fragmented, with a mix of global and local players, making it highly competitive. Some of the strong players include Yamato, Sagawa Express, TNT Express, Japan Post, and FedEx. Geek+, a global provider of smart logistics solutions, announced that it had powered same-day delivery for Nike in Japan, providing advanced robotics solutions to Nike's new distribution center in China and deploying more than 200 robots from its goods-to-person P series line. The smart robots carry Nike products and packages directly to the warehouse worker, reducing costs, increasing picking efficiency, and making daily work easier on the warehouse operators.

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