

ASEAN Road Freight Transport - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts 2016 - 2028

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Report description:

The ASEAN Road Freight Transport Market size is estimated at USD 141.53 billion in 2024, and is expected to reach USD 173.91 billion by 2028, growing at a CAGR of 5.29% during the forecast period (2024-2028).

Key Highlights

- Largest Segment by Distance - Long Haul : Long-haul trucking garners the highest market share in the ASEAN road freight transport market owing to the initiatives taken by the government to increase infrastructure developments that facilitated the growth of this segment by facilitating cross-border transportation.
- Largest Segment by Product Type - Solid Goods : Solid goods dominate the product type segment over liquid goods in ASEAN as industries such as construction, textile and apparel, machinery and equipment, electronics, automobiles, and others are included in the solid goods category.
- Largest Segment by End User - Manufacturing : Manufacturing end-user segment is the largest segment in the ASEAN region. The sector contributed around 7.01% towards GDP in the region. Hence, the sector is a major driver of economies in the region.
- Fastest Growing Segment by TruckLoad Specification - Less than Truckload : Small and medium-sized enterprises are one of the key end users of this service, making the less-than truckload segment the fastest-growing sector among truckload specifications in the ASEAN region.

ASEAN Road Freight Transport Market Trends

Manufacturing is the largest segment by End User.

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- The Indonesian wholesale and retail trade sector captured the highest market share of 28.12% in 2021 in the Indonesian road freight transport market. The wholesale and retail trade sector contributed USD 108.06 billion in 2021 to the country's GDP, up from USD 97.06 billion in 2020, witnessing a YoY growth rate of 11.33%. The sector contributed 9.10% of the country's GDP in 2021.
- The US imports of Thai agricultural fishery and forest products declined by 1% to USD 4,187 million in 2021 from USD 4,239 million in 2020. Consumer-oriented products accounted for half of US agricultural product imports from Thailand in 2021, followed by seafood products (29%), bulk commodities (18%), intermediate products (4%), and forest products (2%), respectively.
- In Malaysia, the wholesale and retail trade recorded a sales value of MYR 92.7 billion (USD 22.18 billion) in July 2021, registering a negative growth rate of -14.7% YoY. The fall was contributed by all sub-sectors, with motor vehicles -85.4%, retail trade -8.1%, and wholesale trade -1.1%. In terms of volume index, wholesale and retail trade registered a negative growth of -16.7% YoY to record 106.5 points. The main sub-sector that contributed to the fall was motor vehicles, with a decrease of -88.2%. Retail and wholesale trade also recorded negative growth of -8.9% and -4.0%, respectively. However, the seasonally adjusted volume index grew by 1.0% month-on-month in July 2021.

Indonesia is the largest segment by Country.

- Indonesia is the leader in the ASEAN region in terms of trade volumes. In 2021, the GDP from road transportation in Indonesia was IDR 407.34 trillion (USD 28.56 billion), showing an increase of around IDR 26 trillion (USD 1.82 billion) from the previous year. In comparison to other segments of the Indonesian transportation and warehouse industry, air transportation witnessed the highest decrease of around IDR 9 trillion (USD 0.63 billion) from the previous year.
- Thailand holds the second position in the ASEAN region regarding trade volumes. In 2020, the total logistics cost in the country amounted to around THB 2.2 trillion (USD 73.3 billion), indicating a slight decrease from the previous year. In that year, the cost of transport accounted for the largest share of the logistics cost in the country. In 2020, the contribution of logistics cost to the total GDP in Thailand amounted to around 14.1%. In that year, the total logistics cost in the country amounted to over THB 2 trillion (USD 66.63 billion).
- Malaysia comes third in the ASEAN region in terms of trade volumes. To further boost trade, the government has taken various initiatives. The Malaysian government has made considerable progress in expanding and modernizing its infrastructure throughout the country. This effort is evident in the five-year centralized economic development plan known as the Malaysia Plan, whereby public sector infrastructure development consistently holds the largest funding portion. Among the revived mega infrastructure projects are the 640 km-long East Coast Rail Link project, which resumed work on July 25, 2020, after a year-long suspension.

ASEAN Road Freight Transport Industry Overview

The ASEAN Road Freight Transport Market is fragmented, with the top five companies occupying 1.08%. The major players in this market are Deutsche Post DHL Group, Kerry Logistics Network Limited, MOL Logistics, Tiong Nam Logistics and Yamato Transport (sorted alphabetically).

Additional Benefits:

- The market estimate (ME) sheet in Excel format
- 3 months of analyst support

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