

Malaysia Freight And Logistics - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts 2017 - 2029

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Report description:

The Malaysia Freight And Logistics Market size is estimated at USD 27.81 billion in 2024, and is expected to reach USD 35.10 billion by 2029, growing at a CAGR of 4.77% during the forecast period (2024-2029).

Rising export since economic recovery in 2021 and investment opportunities leading to freight demand

- Trade flow (import and export volumes) is a major factor in increasing the demand for freight and logistics services in the transportation sector. Malaysia's total trade grew at 8.6% YoY in December 2022, with the amount of RM 236 billion (USD 53.50 billion) as compared to RM 217.4 billion (USD 49.28 billion) in December 2021. Exports increased by 6% to RM 131.9 billion (USD 29.90 billion) in December 2022. Imports increased to RM 104.1 billion (USD 23.60 billion) risen by 12% YoY.
- Cross-border spending is high in Malaysia and accounts for 4 out of 10 of all e-commerce transactions in the country. The major factors for Malaysians to choose international seller brands include better prices (72%) and access to items unavailable in the country (49%). The top three countries for cross-border sales are China, Singapore, the United States, and Japan. The market share of cross-border e-commerce in Malaysia is almost equal to that of domestic e-commerce, which further promotes transportation service demand.
- Malaysia's infrastructure development is seeing a focus on clean energy transition, with local companies (including government owned companies) taking bold steps for developing new technologies. These include new project announcements in areas of rooftop solar, floating solar, battery storage, hydrogen etc. For instance, in May 2022, Masama Sdn Bhd awarded Sarawak Consolidated Industries Bhd (SCIB) a RM 38 million (USD 8.61 million) engineering, procurement, construction and commissioning contract to undertake a road construction project in Sarawak, Malaysia. The road will connect Baleh Bridge, RH Belaja, Ng Benin, SK Ng Pelagus and Pelagus Resort in Kapit. The project was completed in March 2023.

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Malaysia Freight And Logistics Market Trends

Malaysia's transportation and storage sector experienced 33.42% YoY growth in 2022, despite USD 7.25 million FDI deficit

- The transportation sector in Malaysia is integral to the nation's socio-economic progress. Transportation and storage in Malaysia experienced significant growth, jumping from 2.60% YoY in 2021 to a remarkable 33.42% YoY in 2022. This surge was driven by rising demand for road transportation, mainly from the manufacturing sector, fast-moving consumer goods (FMCG) companies, and automotive players, as major companies in Malaysia expanded their production capacities. In 2022, the transportation and storage, In 2022, there was a deficit of about MYR 32 million (USD 7.25 million) in net foreign direct investment inflows into the transportation and storage sectors in Malaysia. Foreign direct investment.
- The Malaysian government intends to transform its logistics services by centralizing the planning and development of its logistics hub, accelerating digital adoption, and encouraging industry mergers and acquisitions. Malaysian Investment Development Authority (MIDA) has approved more than 19 projects under the cold chain investment incentive scheme Throughout the years.
- The MRT3 is the last critical route to complete the Kuala Lumpur urban rail network; the line is 50.8 km long and runs around Kuala Lumpur's outskirts. Its construction is expected to begin in early 2023 and is slated for full completion by 2030, while operations for the first phase are anticipated to commence in 2028. Through the ECRL, a double-track railway linking infrastructure project, which includes 20 stations, began in 2017, with 14 passenger stations, five combined passenger and freight stations, and one freight station.

To meet the demand for refined petroleum products, Petronas invested USD 20 billion in the 'RAPID' project in Malaysia

- In Malaysia, a liter of diesel cost USD 0.49 in the second week of August 2021, while super unleaded petrol cost USD 0.48. In 2021, the GOM spent MYR 4.30 billion (USD 0.97 billion) and MYR 2.9 billion (USD 0.65 billion) on gasoline and diesel subsidies. The GOM introduced the biodiesel mandate to reduce the impact of high petroleum prices and subsidy spending.
- Petrol and diesel prices are subsidized in the country, with RON 95 (USD 20.47) fixed at USD 0.46 and diesel at USD 0.47, while the price of RON 97 (USD 20.91) is floating at USD 0.76 a liter. The Brent Crude Oil contract for May 2022 delivery was trading at USD 128 (MYR 536.32) a barrel, with prices of commodities rallying on bullish demand-supply fundamentals in the past few months and further. Refined petroleum products, which accounted for 12.7% of total exports, expanded by MYR 10.7 billion (USD 2.42 billion) to MYR 18.6 billion (USD 4.21 billion) in line with the increase in average export volume (+45.1%) boosted by the Russia-Ukraine War. Rising energy prices will reinforce the growth slowdowns in developed economies, pressuring Asian export growth in 2022.
- As part of Malaysia's goal to construct the oil refining and storage hub to meet the domestic demand for refined petroleum products, Petronas has invested about USD 20 billion in the Refining and Petrochemicals Integrated Development Project (RAPID) in Johor. At the same time, an investment of nearly USD 11 billion was made for associated facilities. The project has a nameplate capacity of 279,000 bpd and is expected to be fully commissioned by the end of 2023. The RAPID facility will be the country's first refinery to produce diesel and gasoline that meet the Euro V standard, which lowers carbon dioxide emission levels.

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Malaysia Freight And Logistics Industry Overview

The Malaysia Freight And Logistics Market is fragmented, with the top five companies occupying 8.65%. The major players in this market are DB Schenker, Deutsche Post DHL Group, FedEx, MMC Corporation Berhad and Nippon Yusen Kabushiki Kaisha (sorted alphabetically).

Additional Benefits:

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

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