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Myanmar Freight and Logistics - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts 2020 - 2029

Market Report | 2024-02-17 | 200 pages | Mordor Intelligence

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Report description:

The Myanmar Freight and Logistics Market size is estimated at USD 7.29 billion in 2024, and is expected to reach USD 12.26 billion by 2029, growing at a CAGR of 10.96% during the forecast period (2024-2029).

The logistics sector in the country is under transformation, driven by increasing trade activity, improving connectivity, and the entry of major international players.

Key Highlights
-The lack of proper transport infrastructure has hindered the growth of the logistics sector in the country for many years. However, the ongoing developments in the country present a lot of opportunities for logistics players. The country's strategic geographical location is an important factor in attracting investments. The country's location has a special significance in the Asia-Pacific region, connecting the two major economies of China and India. The country acts like a continental bridge connecting the regions of South Asia, East Asia, and Southeast Asia.
-More than three-fourths of the logistics players in the country are involved in the provision of common services, such as unloading, loading, customs clearance, and forwarding services, while the remaining companies provide value-added services, such as labeling, shipment tracking, and cold storage. As the demand for these services is growing, many companies are adding these kinds of services to their existing business portfolio.
-The COVID-19 pandemic impacted many sectors of the economy, including logistics. Manufacturing, logistics, and retail sectors witnessed a high impact, primarily driven by demand and supply shocks, as supply chains were disrupted globally. In addition, the military coup in the country also impacted the logistics sector, with the suspension of flights causing freight rates to increase.

Myanmar Freight & Logistics Market Trends

Road Transport Sector Remains the Dominant Mode of Transportation

Road freight transportation has been emerging as a leading mode of freight transportation in recent years, along with shipping and inland water transport. Road transport is the dominant mode of domestic transportation, helping connect rural areas and support regional and international trade.

The road network in Myanmar is weak and underdeveloped compared to ASEAN nations, with more than half of the road network being unpaved. The improper infrastructure, coupled with the lowest motor vehicle penetration in Southeast Asia, results in high transportation costs and long travel times. This makes the trucking costs in the country comparatively higher than in other countries in ASEAN.

As part of Myanmar's Sustainable Development Policy 2018-30, transport infrastructure development is a prioritized area. The third goal in the report relates to creating jobs and boosting the economy with the help of the private sector.

Cross-border trade has been gaining more importance across Southeast Asia and has become key for increasing trade activity and economic development. All the countries in the region have joined hands and created cooperative development to increase competitiveness altogether. In this context, cross-border trade is expected to be a major driver of the Burmese trucking industry.

Developments in Transport Infrastructure to Improve Connectivity and Drive the Logistics Market

Myanmar's significant reforms include merging the ministries related to transportation under a single Ministry of Transport, expanding transport networks to reduce transportation costs, improving water transport along the Ayeyarwady and Chindwin rivers, and allowing private companies to manage Yangon and Mandalay international airports under the PPP (public-private partnership) scheme.

In order to increase freight transport efficiency and maximize investments in the sector, a logistics corridor development strategy is being considered. Under this strategy, investments will be concentrated within six so-called logistics corridors, including major transport and cargo systems, such as roads and rivers linking large industrial clusters to border gates and ports.

The establishment of six logistics corridors that run through the country, which is fundamental to the plan, includes the North-South Logistics Corridor between Yangon and Southern China, South-East Logistics Corridor to Thailand, Trans-Myanmar Logistics Corridor connecting Kyaukphyu in Rakhine State with Tachileik in Shan State, Myanmar-India Logistics Corridor, Main River Logistics Corridor, and Coastal Marine Logistics Corridor.

Myanmar Freight & Logistics Industry Overview

The freight and logistics market in Myanmar is fragmented, with a large number of enterprises. The major freight transport and logistics services players are private companies, except for the railway freight operation undertaken by Myanmar Rail (MR) and the inland waterway transport operation undertaken by large vessels of around 1,000 DWT by the Inland Waterway Transport (IWT).

Most of the companies operating in the country's logistics sector are small and medium-sized enterprises. Yusen Logistics, DB Schenker, DHL, CEA Project Logistics, and EFR Group are some prominent logistics players active in the market. Though the market has a presence of several leading players from all over the world, it is still a fragmented market without any dominant players.

The majority of the local players offer services such as unloading, loading, customs clearance, and forwarding services. The transforming logistics sector of the country, which is in an expansion phase, is being driven by growing trade activities.

Additional Benefits:

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

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