

## **ASEAN Courier, Express, and Parcel (CEP) - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)**

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### **Report description:**

The ASEAN Courier, Express, and Parcel (CEP) Market size is estimated at 16.68 billion USD in 2025, and is expected to reach 23.51 billion USD by 2030, growing at a CAGR of 7.11% during the forecast period (2025-2030).

Rising e-commerce potential is boosting the domestic CEP market, which dominates the industry

- In July 2023, Cainiao Group, the logistics arm of Alibaba Group, inaugurated its first warehouse in Jakarta, Indonesia, as part of its regional expansion strategy. The newly established Cainiao Cikarang Logistics Park is the third warehouse in its Southeast Asian network of Cainiao Hubs (cHubs). Situated in GIC Deltamas Cikarang, Bekasi Regency, east of Jakarta, the project spans 320,000 sqm, housing 6 warehouses across 170,000 sqm.
- In 2023, e-commerce emerged as a pivotal catalyst for the growth of both domestic and international CEP markets in Thailand, surging to USD 16.41 billion. This figure is projected to reach USD 24.81 billion by 2027. The demand for CEP deliveries in Thailand is primarily driven by electronics, personal and household items, food and beverages, as well as toys, hobbies, and DIY products. The e-commerce market in Thailand is expected to witness a significant rise in users, reaching an estimated 15,190,000 by 2028. User penetration is forecasted to increase from 20.6% in 2024 to 24.8% by 2028.

Adoption of e-delivery vehicles, establishment of cargo villages among drivers of regional market demand

- The parcel volume in the region was driven mainly by surge in e-commerce-led parcel shipments along with other end users. Several initiatives are being undertaken to strengthen air and road deliveries of parcels in Vietnam. For instance, for 2021-2030,

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major works for strengthening airport infrastructure are underway, the biggest of which is at the Hanoi and existing Ho Chi Minh City airports, with an investment worth USD 9.6 billion. Also, in 2018, DHL, a global courier, launched electric vehicles for the efficient delivery by road.

- In 2015, UPS, a leading parcel giant, ventured into Myanmar with its express delivery service. The express services facilitate businesses to deliver across and beyond Myanmar, with transit times between 1 and 3 business days across Asia, Europe, and the United States. In 2019, Thailand Post adopted a pilot program to deliver parcels through electric vans to reduce its carbon footprint and aims to transform its deliveries through electric fleets by 2050. Also, DHL aims to increase its EV fleet in Thailand to 71 by 2023.

#### ASEAN Courier, Express, and Parcel (CEP) Market Trends

Rising FDI in ASEAN countries supported by infrastructure construction projects by country governments driving economic growth

- In May 2024, the Japanese government announced a loan of about JPY140.7 billion (USD 900 million) to build a high-speed rail line in Jakarta, Indonesia. The East-West rail project will cover 84.1 km and be completed in two phases, starting in 2026 and finishing by 2031. The new rail line will feature Japanese technology for trains and signaling systems. Such initiatives are expected to boost GDP contribution from transport and storage sector.

- In February 2024, the Transport Ministry announced plans to invest USD 18.83 billion in around 150 transport projects by the end of 2025 to enhance Thailand's infrastructure. In 2024, 64 projects will commence, with an additional 31 projects valued at USD 11.23 billion in the pipeline. For 2025, there are 57 new projects planned, totaling USD 7.59 billion. These initiatives include 18 motorway projects, 9 railway projects, and plans for regional port development, all aimed at bolstering the transport and storage sector's contribution to GDP in the future.

Impact of the Iran-Israel conflict and Ukraine-Russia war on ASEAN countries led to increased fuel prices and supply chain disruptions

- Indonesia expects a 29% increase in oil and gas sector investments in 2024 to boost drilling and exploration after Shell and Chevron's recent exits. This push is vital for Indonesia to counter a long-term decline in output amid rising financing challenges for fossil fuel projects. Foreign companies like Eni, Exxon Mobil, and BP will contribute 40% of 2024's planned investments. Also, in early 2024, the Ministry of Oil and Gas announced that fuel prices at gas stations will stay stable until at least June 2024, despite the Iran-Israel conflict potentially raising oil prices to USD 100 per barrel.

- Diesel prices in Malaysia surged by over 50% in June 2024 as part of Prime Minister Anwar Ibrahim's efforts to reform the country's long-standing fuel subsidy system. The restructuring aimed to alleviate pressure on national finances by eliminating universal energy subsidies and focusing assistance on those most in need. This move also aims to address issues like the smuggling of subsidized diesel to neighboring countries, where it fetches higher prices.

#### ASEAN Courier, Express, and Parcel (CEP) Industry Overview

The ASEAN Courier, Express, and Parcel (CEP) Market is moderately consolidated, with the major five players in this market being DHL Group, FedEx, J&T Express, SF Express (KEX-SF) and United Parcel Service of America, Inc. (UPS) (sorted alphabetically).

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Additional Benefits:

- The market estimate (ME) sheet in Excel format
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