

ASEAN Cross Border Road Freight Transport - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)

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Report description:

The ASEAN Cross Border Road Freight Transport Market size is estimated at 43.3 billion USD in 2025, and is expected to reach 60.92 billion USD by 2030, growing at a CAGR of 7.07% during the forecast period (2025-2030).

Singapore and Malaysia account for about 50% of the cross-border e-commerce market in Southeast Asia

- Indonesia's manufacturing industry grew by 5.01% in 2022. It was the strongest component of the country's economic growth in terms of productivity. Moreover, total exports from the industrial sector reached USD 206.35 billion in 2022, a 16.45% increase compared to the previous year. The Indonesian government estimated a 5.4-5.8% growth for the manufacturing industry in 2023. Similarly, Thailand's automotive industry has established itself as a major player in the global market, with auto parts and accessories accounting for a significant portion of its exports. As a result, the demand for cross-border services is increasing in the region.

- In the coming years, the growth in the cross-border e-commerce market is expected to boost the wholesale and retail trade end-user segment. Vietnam has one of the fastest-growing cross-border e-commerce markets in the region, while Thailand's Industry 4.0 initiative promotes the importance of technological innovation for boosting economic growth. These markets offer significant opportunities for cross-border brands. The 'unbanked' population, primarily in Vietnam, is expected to grow by 57% in digital payments by 2025.

Implementation of the ASEAN Customs Transit System (ACTS) is expected to boost the cross-border road freight transport

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- Cross-border shopping is thriving in Southeast Asia, with Vietnam holding 15% of the region's internet retail market, second to Thailand. In December 2023, Idec Group Asia Vietnam began building a logistics and industrial warehouse in Bac Ninh province, investing USD 51.3 million. Covering 12 hectares, the warehouse will meet European standards, with features like a 5-ton/sq. m floor load capacity, NFPA-compliant fire protection, and a 10.9-meter clear height.
- Implementing the ASEAN Customs Transit System (ACTS) has been one of the most significant developments in the road freight market in the last year. The ASEAN community's aims of doubling intra-ASEAN trade between 2017 and 2025 and cutting trade transaction costs by 10% in three years from 2017 were considered when the ACTS was developed and launched in 2020 in Cambodia, Laos, Malaysia, Singapore, Thailand, and Vietnam. The ACTS is expected to strengthen cross-border road freight in ASEAN countries during the forecast period.

ASEAN Cross Border Road Freight Transport 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 Cross Border Road Freight Transport Industry Overview

The ASEAN Cross Border Road Freight Transport Market is fragmented, with the major five players in this market being Deutsche

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Bahn AG (including DB Schenker), DHL Group, Konoike Group (including Konoike Transport Co., Ltd.), Mitsui O.S.K. Lines and SF Express (KEX-SF) (sorted alphabetically).

Additional Benefits:

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

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