

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

Market Report | 2025-04-28 | 261 pages | Mordor Intelligence

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Report description:

The ASEAN Road Freight Transport Market size is estimated at 119.4 billion USD in 2025, and is expected to reach 160.1 billion USD by 2030, growing at a CAGR of 6.04% during the forecast period (2025-2030).

Thailand aims for 30% of the total vehicle production to account for electric cars by 2030 through the Electric Vehicle Policy

- 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, Thailand is one of the largest automotive manufacturers in Southeast Asia, producing over 2 million vehicles annually for various household brands. The country's Electric Vehicle Policy aims for 30% of the total vehicle production to account for electric cars by 2030. The Thai government successfully attracted major automotive brands, such as Japanese, European, and US manufacturers, to set up production and export bases in Thailand.
- During the period 2023-2027, the ASEAN e-commerce market is projected to register a CAGR of 11.11%. This growth in the e-commerce market is expected to boost the wholesale and retail trade end-user segment. Moreover, the increase in exploration and production activities is expected to drive the growth of the oil and gas, mining, and quarrying segment. For instance, Indonesia aims to increase its crude oil lifting to 1 million bpd by 2030 and boost efforts to attract investment.

Growing demand for trucking services is supported by rising e-commerce sales and infrastructure development in the industry

- Indonesia is the leader in the ASEAN region in terms of trade volumes. In June 2023, DHL Express expanded its electric fleet in Indonesia with 24 electric transporter vans. The new electric delivery vans will be used in the capital, Jakarta and Bandung. The

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delivery fleet will also be electrified beyond this. The 24 electric transporters will not be the first electric vehicles in the logistics company's Indonesian fleet. So far, DHL Express has four electric vans and six electric bikes in operation in Indonesia, serving areas in Jakarta and Surabaya.

- Malaysia comes third in the ASEAN region in terms of trade volumes. Malaysia's transport infrastructure and logistics services will be further strengthened under the 12th Malaysia Plan (12MP) during 2021-2025. Under the plan, as part of efforts to drive the transport and logistics industry toward competitiveness, the government aims to be in the top 10 rankings of the World Container Port's Report and top 30 ranks in the World Bank Logistics Performance Index by 2025. Putrajaya (a city in Malaysia) is aiming for a 10% increase in cargo volume via rail in the northern, central, and southern regions of the country.

ASEAN 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 Road Freight Transport Industry Overview

The ASEAN Road Freight Transport Market is fragmented, with the major five players in this market being DHL Group, Konoike Group (including Konoike Transport Co., Ltd.), SF Express (KEX-SF), Tiong Nam Logistics Holdings Bhd and "K" Line Logistics, Ltd.

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Additional Benefits:

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

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