

Asia Pacific Domestic Courier - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)

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Report description:

The Asia Pacific Domestic Courier Market size is estimated at 156.6 billion USD in 2025, and is expected to reach 216 billion USD by 2030, growing at a CAGR of 6.64% during the forecast period (2025-2030).

Partnerships between courier companies and e-commerce players are increasing in the region to provide better services

- Domestic courier services are becoming increasingly important in the e-commerce industry. The pandemic brought about a drastic change in shopping behavior over the past years, shifting the shopping process worldwide toward online shopping. Partnerships between courier companies and e-commerce players are increasing in the region. For instance, in March 2022, Delhivery.com, a logistics and supply chain company, announced a partnership with Ajio.com, an e-commerce company. The partnership was made to address the issue of low-quality returned items and ensure that they are reinvented for sale.
- The growth of domestic courier services for medical devices in the Asia-Pacific region is driven by a combination of increasing demand for healthcare services, advancements in logistics technology, and the growth of healthcare e-commerce. In addition, India, China, and Japan have established their footholds in the region, accounting for 85% of the total medical device market. Courier companies are expanding in Asia-Pacific to provide courier services for healthcare products. For instance, in April 2023, JD Logistics took a significant step toward transforming the healthcare industry in China by integrating express delivery services with Guang'anmen Hospital (GAMH).

Australian grocery home delivery market hit USD 8.25 billion in 2023 as rise in internet user penetration

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- In China 2021, about 60% of parcels were delivered on the same day, with JD.com fulfilling 80% of these deliveries. Other major players in same-day delivery include Alibaba and SF Express. These companies have 50-100 service centers to facilitate domestic same-day deliveries, which are quick to deploy and require minor investments. The rise of Q-commerce, focusing on quality, efficiency, and affordability for deliveries within hours of ordering, drives the demand for same-day deliveries. By 2026, the number of quick commerce orders is projected to reach 95 billion, mainly driven by the increasing demand for online food and beverages, valued at USD 151 billion in 2022.
- In 2022, India Post introduced same-day delivery in five cities in Gujarat, while Amazon India launched same-day deliveries within hours for Prime customers in over 50 cities. Similarly, Indonesia is experiencing investment and expansion of same-day delivery services, with a last-mile logistics company receiving USD 3.25 million in funding in 2021. According to the company, this investment primarily focuses on the Indonesian same-day delivery market, which is projected to grow by 30% in 2023.

Asia Pacific Domestic Courier Market Trends

Asia Pacific freight demands driven by global seaborne trade, which is triggering transport sector investments

- On May 17, 2024, a fair at Tokyo Station in Japan highlighted the growing use of high-speed passenger trains for light freight. This shift, driven by a shortage of commercial drivers and new overtime laws, has increased road delivery costs by up to 20%. Since August 2023, JR East has been running a same-day delivery service from Niigata to Tokyo using a dedicated 12-car Series E trainset. Items transported include fresh food, confectionery, drinks, flowers, precision components, and medical supplies. In September 2023, JR East launched a freight-only service on the Tohoku Shinkansen and now offers Hakobyun-branded freight services across its high-speed and Limited Express networks.
- In the 14th Five-Year Plan (2021-2025), China revealed goals for expanding its transportation network. By 2025, high-speed railways will extend to 50,000 kms, up from 38,000 kms in 2020, with 95% of cities with populations above 500,000 covered by 250-km lines. The country aims to increase its railway length to 165,000 kms, civil airports to over 270, subway lines in cities to 10,000 kms, expressways to 190,000 kms, and high-level inland waterways to 18,500 kms by 2025. The primary objective is to achieve integrated development by 2025, emphasizing advancements in the transformation of the transportation system and its contribution to GDP.

Owing to global uncertainties, crude oil prices are soaring in the Asian economies as most of them are net oil importers

- In 2023, China's crude oil imports rose by 11% to 563.99 MMT, driven by higher global oil prices due to the Russia-Ukraine War. In early 2024, imports increased by 5.1% YoY, reaching 88.31 MMT, as China capitalized on lower prices earlier. Brent futures peaked at USD 97.69 in September 2023, dropped to USD 72.29 in December, and rose to USD 84.05 by March 2024. OPEC+'s decision in March 2024 to extend output cuts has further boosted prices, raising concerns about global demand and potentially slowing China's imports in H2 2024.
- Australia's federal government will introduce a new fuel efficiency standard for passenger and light commercial vehicles starting January 1, 2025. This follows a one-month consultation period before drafting the new laws. Announced as part of the 2023 budget and linked to the EV strategy released in April 2023, the standard sets average CO2 targets for vehicle manufacturers. These targets will gradually decrease, requiring the production of more fuel-efficient and low or zero-emissions vehicles.

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Asia Pacific Domestic Courier Industry Overview

The Asia Pacific Domestic Courier Market is fragmented, with the major five players in this market being China Post, SF Express (KEX-SF), SG Holdings Co., Ltd., Shanghai YTO Express (Logistics) Co., Ltd. and Yamato Holdings Co., Ltd. (sorted alphabetically).

Additional Benefits:

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

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