

China Full-Truck-Load (FTL) - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)

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Report description:

The China Full-Truck-Load (FTL) Market size is estimated at 373.2 billion USD in 2025, and is expected to reach 495.3 billion USD by 2030, growing at a CAGR of 5.82% during the forecast period (2025-2030).

The growth of the market is expected to be supported by China's 14th Five-Year Plan (2021-2025)

- China is a significant manufacturer and producer of industrial goods. China's manufacturing and industrial sector. The rise in production is driving the demand for freight services as the trucking industry plays a significant role in ensuring the timely delivery and distribution of manufactured goods domestically. In 2022, the manufacturing sector's output rose by 3% and reached USD 33.5 trillion. China's manufacturing production sustained its development in 2022, with the high-tech manufacturing and equipment manufacturing sectors posting robust performance. Automobile manufacturing has also been increasing tremendously in China. It is estimated that the new energy vehicles (NEVs) could account for as much as 35% of the Chinese domestic market by 2025.
- The agriculture, fishing, and forestry segment is expected to grow, and the output value of the forest and grass industry is estimated to reach about USD 1.41 trillion by 2025. China is also establishing itself as a leader in the international trade of forest and grass products, with the annual import and export value anticipated to reach USD 195 billion by 2025.

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Rising focus on developing clean energy infrastructure and transport sector investment under 14th Five-Year Plan driving growth

- In 2023, China's clean energy sector significantly contributed to the country's economic expansion. According to Energy and Clean Air (CREA), China's investment in renewable energy infrastructure amounted to USD 890 billion, almost matching global investments in fossil fuel supply for the same year. Clean energy, including renewable energy sources, nuclear power, electricity grids, energy storage, electric vehicles (EVs), and railways, constituted 9.0% of China's GDP in 2023, up from 7.2% YoY. EV production grew by 36% YoY in 2023.
- 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.

China's retail diesel and gasoline prices were soared to historically high levels amid the Russia-Ukraine War

- In 2023, China imported 11% more crude oil than in 2022, totaling 563.99 mn metric tons (MMT), or 11.28 mn barrels per day. This surge was due to increased global crude oil prices amid the Russia-Ukraine War, causing fuel prices in China to reach historic highs. In Jan-Feb 2024, crude oil imports rose by 5.1% YoY, reaching 88.31 MMT. This increase was driven by purchasing crude oil at lower prices earlier. Brent futures peaked at USD 97.69 in September 2023, fell to USD 72.29 in December, and rose to USD 84.05 by March 2024. The decision made by the OPEC+ group in March 2024 to extend output cuts until the end of June has further boosted crude prices. This move has raised concerns about global oil demand, as the group is reducing production by nearly 6% of world demand. The recent increase in crude prices may also dampen China's imports starting from H2 2024.
- China plans to adjust retail prices for gasoline and diesel to align with recent shifts in global crude oil prices. The price hike reflects a tightening of global supply and a positive forecast for demand. According to NDRC, gasoline and diesel prices in China will increase by USD 28 per ton in 2024. Although there's expectation of declining demand for fuels, oil-based fuels will remain the primary choice until 2035.

China Full-Truck-Load (FTL) Industry Overview

The China Full-Truck-Load (FTL) Market is fragmented, with the major five players in this market being Changan Minsheng APLL Logistics CO., Ltd., CMA CGM Group (including CEVA Logistics), Deppon Logistics Co., Ltd., Eastern Air Logistics Co., Ltd. (EAL) 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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