

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

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Report description:

The Japan Courier, Express, and Parcel (CEP) Market size is estimated at 35.77 billion USD in 2025, and is expected to reach 44.55 billion USD by 2030, growing at a CAGR of 4.49% during the forecast period (2025-2030).

The e-commerce industry is driving the segmental demand in Japan

- Domestic and cross-border e-commerce is a major driver of the demand for courier, express, and parcel in the country. The e-commerce market was valued at USD 145 billion in 2022, leading to growth in CEP volume. Post re-opening of the economy, overall CEP demand in the country increased. The domestic and international CEP volume grew in 2022 despite the presence of an aging workforce in the country, along with labor shortages. The redelivery of parcels significantly contributed to the growth of the CEP market. For instance, approximately 11.8% of parcels shipped by major door-to-door delivery services in Japan had to be redelivered in October 2022, increasing from 11.7% in April 2022. By 2024, the revenue in the e-commerce industry is expected to reach USD 176 billion, driven by high internet user penetration.
- E-commerce, led by the fashion category with a 25% revenue contribution and the electronics category with a 19% revenue, contributed to the CEP market in 2020, owing to the COVID-19 pandemic. Government-imposed restrictions to curtail the spread of the virus and the work-from-home scenario led to the popularity of the online delivery method. E-commerce is projected to reach USD 225 billion by 2027, significantly increasing demand for the CEP market.

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Japan Courier, Express, and Parcel (CEP) Market Trends

With growing demand for home deliveries & labour shortages, the MILT is focusing on construction of automatic cargo transport roads and logistics tunnels

- On May 17, 2024, a fair at Tokyo Station 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 March 2024, Central Japan Railway Co. abandoned its plan to launch a high-speed maglev train between Tokyo and Nagoya by 2027 due to ongoing environmental opposition in Shizuoka Prefecture, possibly delaying the project until 2034 or later. The Linear Chuo Shinkansen aims to connect Tokyo and Osaka with trains reaching speeds of 500 kilometers per hour, but a small section in Shizuoka has been a major obstacle.

Rising prices of fuel in Japan witnessed in July 2024, highest since October 2023, despite government subsidies

- In July 2024, the Agency for Natural Resources and Energy announced that the retail price of regular gasoline reached USD 1.33 per liter, marking an increase of USD 0.006 from June 2024. This price point is the highest observed in nearly nine months, dating back to October 2023. The uptick in retail prices is attributed to surging wholesale prices. To counteract this, the government has been subsidizing oil refiners, ensuring that wholesale prices remain subdued. Moreover, the subsidy amount saw an uptick, rising to USD 0.19 between June 27 and July 3, which is an increase of USD 0.01 from the week prior.
- Japanese gas utilities expect city gas demand to rise in the fiscal year April 2024 to March 2025, following reduced usage in 2023-24 due to unusually warm weather. Tokyo Gas, Japan's largest gas retailer, forecasts city gas sales will increase by 1.1% to 11.422 billion cubic meters by 2025. Household sales are expected to grow by 3.4% to 2.8 billion cubic meters, while supplies to industry and commercial users are projected to rise by 0.3% to 8.6 billion cubic meters.

Japan Courier, Express, and Parcel (CEP) Industry Overview

The Japan Courier, Express, and Parcel (CEP) Market is fairly consolidated, with the major five players in this market being FedEx, Japan Post Holdings Co., Ltd., Seino Holdings Co., Ltd., SG Holdings 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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