

## **Philippines Freight and Logistics - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)**

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### **Report description:**

The Philippines Freight and Logistics Market is expected to register a CAGR of 7.08% during the forecast period.

#### Key Highlights

- The pandemic increased e-commerce in the nation as cautious consumers stayed home to avoid coming into contact with disease vectors. As more people purchase online and there are more online retailers in the country, this tendency will likely continue. According to the Philippines' Department of Trade and Industry (DTI), there were 1,700 online sellers in March 2020 and 93,318 in January 2021.
- The warehouse industry was still in high demand, driven by the thriving e-commerce business, and this bode well for the industrial and logistics real estate sector's growth in 2022. According to a survey by Colliers Philippines, manufacturing, logistics, and e-commerce will continue to grow in 2022. According to Colliers, the industrial vacancy rate in the Cavite-Laguna-Batangas (CALABA) corridor decreased to 5.6% in the first half of 2021 from 5.7% in 2020.
- Colliers attributed the reduction to the increase in the demand for warehouse and storage space from fast-moving consumer goods (FMCG) companies as the country's online retail market continues to expand. The e-commerce sector is anticipated to contribute around PHP 1.2 trillion (USD 25 billion) by 2022, according to the DTI's e-commerce roadmap. According to Colliers Philippines, the increased need for cold storage facilities is anticipated to support demand for industrial assets over the next 12 to 36 months. By 2023, the Board of Investments (BOI) expects the country's cold chain sector to generate PHP 20 billion (USD 417 million) in income.
- The digital shift has been led by e-commerce firms like Lazada, Zalora, and Shopee, who work with tech-driven logistics firms like Ninja Van and Lalamove to transport items so that customers can track their orders in real-time. Switching to digital will increase order status transparency, reduce lead times, and speed up customs clearance processes by up to 80%, taking only 3-5 business days.

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## Philippines Freight & Logistics Market Trends

### Growth in e-Commerce to Drive the Logistics Market in Philippines

According to Lazada Group, the Philippine e-commerce market is expected to grow faster than its regional competitors. In the next five to ten years, Lazada expects e-commerce in the Philippines and the rest of Southeast Asia to grow "a lot higher" as these countries recover from the pandemic despite the global economic slowdown and rising prices.

Moreover, in 2022, cross-border e-commerce sales also witnessed a growth rate, and as per a United States Department of Agriculture (USDA) study, more than 70 million online users in the Philippines participated in cross-border e-commerce (CBE), mostly purchased non-food items accounting for the fourth largest contribution to the e-commerce sales market. The unprecedented growth in border e-commerce sales is majorly driven by Filipino consumers' shift towards acquiring a variety of imported goods directly.

In addition, the growing awareness among Filipino consumers regarding imported products and food and beverages further bolstered the CBE sales, from zero in 2019 to almost USD 1 million in purchases in 2022. Also, the developments in cross-border e-commerce sales further drive demand for freight forwarders, warehouses, other value-added services, etc. Meanwhile, in 2022, electronic goods witnessed significant sales from e-commerce platforms, and the sales amounted to more than USD 6 billion, followed by personal and household care, furniture, fashion, etc. Thus, the growing e-commerce sales create huge opportunities for logistics providers in the country.

### Increased Spending on Infrastructure to Propel the Freight and Logistics Market in the Philippines

In the customary areas of transportation, energy, and WASH, the Philippines has announced new projects for 2022. (water projects). The local firms continue to hold the majority of the market share, but some collaborations with international players are being formed in new or emerging industries (such as a planned public-private partnership for a data center) when the local players lack the necessary technological expertise.

Government programs, such as the Philippines Cold Chain Project (PCCP), funded by the United States, are also helping to improve the Southeast nation's cold chain logistics infrastructure. The PCCP is a four-year project funded by the US Department of Agriculture (USDA). It is attempting to organize producer groups to increase agricultural productivity and meet international food safety standards by providing improved technologies, expanding cold chain-related markets, and strengthening intermediate organizations.

The Philippines' PHP 11 Bn (USD 214 Million) public-private partnership to rehabilitate Kennon Road has received expressions of interest from possible bidders, including China First Highway Engineering and JFE Engineering Corporation of Japan (PPP). Local building firms First Balfour and Riofil Corporation were among the others. The National Economic and Development Authority (NEDA) of the Philippines is where the DPWH will present the Kennon Road project for final approval. The 33km road has to be widened, 18 bridges need to be upgraded, and slope protection needs to be built.

The Philippines' railway network is undergoing a rebirth after decades of neglect and underspending that has left it in a decrepit state. Among the government's top priorities is the flagship North-South Commuter Railway in Manila, its largest-ever individual infrastructure investment. NSCR is envisaged as a 163 route-km suburban railway network connecting the regional growth centers of Clark and New Clark City in the north with central Manila and Calamba City in Laguna province to the south of the capital.

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However, in January 2022, according to the Department of Public Works and Highways, 15 out of 119 flagship infrastructure projects of the Philippine government had been completed, which includes the improvement of remaining sections along the Pasig River. Meanwhile, 77 projects remain at the construction stage, while 27 are in the pipeline. Thus, the increasing logistics and infrastructure projects across the country are expected to fuel the freight and logistics operations.

## Philippines Freight & Logistics Industry Overview

The competition in the Philippines freight and logistics market is fragmented, with the presence of many local and international logistics service providers. Some of the existing major players in the market include FedEx, UPS, DHL, Kuehne + Nagel, PHL Post, Nippon Express, and 2GO Express.

The international players are making strategic investments to establish a regional logistics network, such as opening new distribution centers, smart warehouses, etc. The growth of e-commerce is an essential factor spurring the development of courier services. Increasing consumption and Internet penetration are boosting e-commerce activity in the Philippines.

### Additional Benefits:

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

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