

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

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Report description:

The Vietnam Courier, Express, and Parcel (CEP) Market size is estimated at 1.75 billion USD in 2025, and is expected to reach 2.53 billion USD by 2030, growing at a CAGR of 7.66% during the forecast period (2025-2030).

Growth expected in the Vietnamese CEP market owing to increases in e-commerce adoption and cross-border trade

- On September 25, 2021, the Vietnamese government issued Decree No. 85/2021/ND-CP, which provides guidance and updates on e-commerce activities conducted by foreign entities. The decree came into effect on January 1, 2022, and focuses on regulating cross-border e-commerce activities of foreign entities. The decree addresses the e-commerce activities of foreign entities, including operating e-commerce websites in Vietnam and selling goods through Vietnamese e-commerce platforms. According to the decree, foreign entities engaged in e-commerce activities in Vietnam must register with the Ministry of Trade and Industry and establish a representative office within the country or appoint an authorized representative.
- Among the various categories in the e-commerce industry, the electronics segment accounted for the largest share of revenue, amounting to 41.32% in 2023, followed by the fashion segment, with a revenue share of 15.54%. The market is expected to reach USD 19.30 billion by 2027.

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

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The government aims to increase the total length of expressways to 3,000 km by end of 2025

- In 2023, the Government prioritized investment in modern transport infrastructure, including roads, railways, marine and inland waterways, and airports. In 2023, construction began on 12 North-South expressway projects, with nine new traffic projects inaugurated and four completed. Around 475 km of expressways were added that year. Other key transport projects initiated in 2023 included three east-west expressways, the Long Thanh International Airport, Phu Bai Airport, Dien Bien Airport, My Thuan 2 Bridge, and Vinh Tuy 2 Bridge. As major transport infrastructure is completed in 2023, the GDP growth of the transport sector is estimated to increase in 2024 and 2025.
- Vietnam's Ministry of Transport plans to break ground on 14 infrastructure projects and complete 50 more by 2025, including key parts of the North-South Expressway. This is part of the goal to expand the country's expressways to 3,000 km by 2025, up from the current 2,021 km. Additionally, the Long Thanh International Airport, a USD 14.12 billion project in Dong Nai province, is on track to finish in 2025. Once completed, it will be the country's largest airport, easing congestion at Tan Son Nhat in Ho Chi Minh City.

Vietnam aims to expand its national fuel storage capacity by 2030, with an investment of up to USD 11.4 billion

- In December 2023, Vietnam reduced retail prices of gasoline and other oil products for the fourth consecutive time. The price of E5 RON 92 per liter was decreased by VND 509 (USD 0.021) to VND 21,290 (USD 0.9), and RON95-III petrol price was lowered to VND 22,322 (USD 0.944) per liter. The ministries of finance, industry, and trade responsible for these adjustments opted not to utilize the petrol and oil price stabilization fund. Since the start of the year, Vietnam has adjusted petrol prices 35 times.
- In 2022, the retail price of RON 95 gasoline in Vietnam reached its highest point in eight years, reaching VND 26,287 (USD 1.14) per liter. The increase in fuel prices in Vietnam was exacerbated by domestic gasoline shortages caused by the Nghi Son Oil Refinery, the country's largest refinery, reducing production by 20% from January 2022 due to financial challenges. Although the refinery has obtained temporary investment, it might be forced to cease operations if it fails to secure sufficient liquidity or loans to procure Kuwaiti crude oil. Moreover, Vietnam has approved a plan to expand its national fuel storage capacity by 2030, with an investment of up to USD 11.4 billion. The investment would raise the country's crude oil and refined fuel storage capacity to 75 to 80 days of net imports, from 65 days currently.

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

The Vietnam Courier, Express, and Parcel (CEP) Market is moderately consolidated, with the major five players in this market being DHL Group, Giaohangtiethiem, J&T Express, Vietnam Posts and Telecommunications Group (including Vietnam Post Corporation) and ViettelPost (sorted alphabetically).

Additional Benefits:

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

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