

ASEAN Cross Border Road Freight Transport - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2026 - 2031)

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Report description:

ASEAN Cross Border Road Freight Transport Market Analysis

ASEAN cross border road freight transport market size in 2026 is estimated at USD 46.32 billion, growing from 2025 value of USD 43.3 billion with 2031 projections showing USD 64.92 billion, growing at 6.98% CAGR over 2026-2031. Rising intra-ASEAN trade, valued at USD 800 billion by 2030, is sharpening the focus on predictable trucking capacity, while the ASEAN Single Window continues to trim average border clearance by four days, lowering landed costs and elevating service reliability. Digital freight platforms tapping the ASEAN Customs Transit System (ACTS) API infrastructure reduce empty-mile rates and attract multinational shippers that require real-time shipment visibility. At the same time, manufacturing FDI reallocations toward Cambodia, Laos, Myanmar, and Vietnam (CLMV) anchor fresh component corridors, while Indonesia's downstream nickel-processing boom creates steady hazardous-goods volumes that reward certified carriers. Persistent driver shortages, new fuel-pricing regimes, and rail competition from the Kunming-Vientiane route remain the principal headwinds.

ASEAN Cross Border Road Freight Transport Market Trends and Insights

ASEAN E-Commerce Boom Fuels Time-Sensitive Cross-Border Truckload Demand

Soaring parcel volumes have moved the market toward smaller, higher-frequency shipments that challenge legacy full-truckload models yet unlock premium pricing for expedited cross-border lanes. J&T Express handled 1.69 billion parcels in Southeast Asia during Q2 2025, a 65.9% year-on-year rise, relying on 5,400 long-haul vehicles that now traverse multiple borders daily.

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Marketplaces increasingly insist on guaranteed next-day delivery windows and API-enabled status updates, prompting fleets to install telematics and dynamic routing tools. This digital integration supports growth in cross-border express services and compresses transit windows, heightening the competitive advantage of carriers that embrace platform economy standards.

ACTS and Allied Trade-Facilitation Frameworks Cut Border Dwell Time

The ASEAN Customs Transit System represents a structural change in compliance processing, providing a single electronic guarantee regime that simplifies multi-country clearances and slashes paperwork. Early-adopter corridors linking Singapore, Malaysia, and Thailand report dwell-time reductions from 24 hours to under six, producing higher trailer turns and improved asset yields. Singapore's 2025 upgrade of vehicle-permit procedures aligns road-haul documentation with ACTS data fields, underpinning seamless transfers. Authorized Economic Operator (AEO) fast-track lanes further demarcate a tiered framework that rewards compliant carriers, raising barriers for informal truckers and nudging shippers toward vetted fleets.

Chronic Driver Shortages and Ageing Truck Fleets Push Operating Costs Up

Regional wage gaps and demographic shifts squeeze the pool of qualified drivers, with Japan recruiting Vietnamese and Indonesian operators under its specified-skills visa to plug its own shortages, further draining local supply. Older vehicles require more downtime, and operators hesitate to reinvest amid fuel-price volatility following Malaysia's 2024 diesel subsidy removal. Certification requirements for hazardous and temperature-controlled haulage exacerbate scarcities, inflating driver premiums in these niches. Fleet renewal programs, including tax rebates in Thailand for Euro 6 trucks, partially soften the blow, yet cannot fully offset the immediate labor mismatch.

Other drivers and restraints analyzed in the detailed report include:

Rapid Manufacturing FDI Shift to CLMV Drives Intra-ASEAN Component Flows
Digital Freight Platforms Using ACTS Apis Slash Empty-Mile Rates
Rail Modal Shift on Kunming-Vientiane and Pan-Borneo Corridors Cannibalizes Long-Haul Road Tonnage

For complete list of drivers and restraints, kindly check the Table Of Contents.

Segment Analysis

Manufacturing contributed 33.78% to the ASEAN cross border road freight transport market share in 2025, reflecting entrenched just-in-time supply chains for electronics, automotive, and apparel components. Component-heavy corridors-such as China to Vietnam and Vietnam to Thailand-register daily loops that underpin elevated trailer utilization rates and sustain high-capacity purchases among large 3PLs. The influx of China-plus-one investment cements Vietnam and Cambodia as assembly hubs, inflating demand for cross-border shuttle runs feeding final-assembly lines. Wholesale and retail trade, although accounting for a smaller base, will outrun every other sector at an 8.08% CAGR between 2026-2031, propelled by surging B2C parcel flows that call for tight delivery windows and frequent dispatches. These twin patterns build a more complex freight mix that forces carriers to diversify equipment-from dry vans to temperature-controlled units-ensuring they capture value across multiple verticals.

The oil and gas, mining, and quarrying cluster receives a structural uplift from Indonesia's nickel-processing boom, which necessitates specialized truck fleets outfitted for hazardous materials. Cold-chain build-outs for fisheries in Thailand and Vietnam add reefer lanes, while construction materials benefit from large-scale road and rail projects entwined with China's Belt and Road initiatives. The sector mix signals a shift away from dominance by bulk commodities toward a balanced portfolio where high-value, time-critical loads command premium yields. This evolution underpins the ASEAN cross border road freight transport market size expansion trajectory, reinforcing the strategic imperative for fleet renewal and driver up-skilling.

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The ASEAN Cross Border Road Freight Transport Market Report is Segmented by End User Industry (Agriculture, Fishing, and Forestry, Manufacturing, Construction, Oil and Gas, Mining and Quarrying, Wholesale and Retail Trade, and Others) and by Country (Indonesia, Malaysia, Thailand, Vietnam, and Rest of ASEAN). The Market Forecasts are Provided in Terms of Value (USD).

List of Companies Covered in this Report:

"K"Line Logistics, Ltd. Bintang Baru Forwarding Sdn. Bhd. DHL Group Dimerco EWT Logistics Gemadept GEODIS J&T Express Kart Asia Konoike Group (including Konoike Transport Co., Ltd.) LOGISTEED, Ltd Mitsui O.S.K. Lines Nippon Express Holdings Overland Total Logistic Services (M) Sdn Bhd Profreight Group SF Express (KEX-SF) SUMISHO GLOBAL LOGISTICS (THAILAND) CO., LTD. Team Global Logistics Co., Ltd. Tiong Nam Logistics Holdings Bhd Yatfai

Additional Benefits:

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

Table of Contents:

- 1 Introduction
 - 1.1 Study Assumptions and Market Definition
 - 1.2 Scope of the Study
- 2 Research Methodology
- 3 Executive Summary
- 4 Market Landscape
 - 4.1 Market Overview
 - 4.2 GDP Distribution by Economic Activity
 - 4.3 GDP Growth by Economic Activity
 - 4.4 Economic Performance and Profile
 - 4.4.1 Trends in E-Commerce Industry
 - 4.4.2 Trends in Manufacturing Industry
 - 4.5 Transport and Storage Sector GDP
 - 4.6 Logistics Performance
 - 4.7 Length of Roads
 - 4.8 Export Trends
 - 4.9 Import Trends
 - 4.10 Fuel Pricing Trends
 - 4.11 Trucking Operational Costs
 - 4.12 Trucking Fleet Size by Type
 - 4.13 Major Truck Suppliers
 - 4.14 Road Freight Tonnage Trends
 - 4.15 Road Freight Pricing Trends
 - 4.16 Modal Share
 - 4.17 Inflation
 - 4.18 Regulatory Framework
 - 4.19 Value Chain and Distribution Channel Analysis

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4.20 Market Drivers

- 4.20.1 ASEAN E-Commerce Boom Fuels Time-Sensitive Cross-Border Truckload Demand
- 4.20.2 ACTS and Other ASEAN Trade-Facilitation Frameworks Cut Border Dwell Time
- 4.20.3 Rapid Manufacturing FDI Shift to CLMV Drives Intra-ASEAN Component Flows
- 4.20.4 Battery-Grade Nickel Exports from Indonesia Create Hazardous-Goods Trucking Corridors
- 4.20.5 Cold-Chain Build-Out for Seafood and Produce Opens New Temperature-Controlled Lanes
- 4.20.6 Digital Freight Platforms Using ACTS APIs Slash Empty-Mile Rates

4.21 Market Restraints

- 4.21.1 Chronic Driver Shortages and Ageing Truck Fleets Push Operating Costs Up
- 4.21.2 Uneven Axle-Load Enforcement Disrupts Long-Haul Scheduling
- 4.21.3 Rail Modal Shift on Kunming-Vientiane and Pan-Borneo Corridors Cannibalises Long-Haul Road Tonnage
- 4.21.4 Methanol Price Spikes Jeopardise Indonesia's B40 Biodiesel Cost Advantage

4.22 Technology Innovations in the Market

4.23 Porter's Five Forces Analysis

- 4.23.1 Threat of New Entrants
- 4.23.2 Bargaining Power of Buyers
- 4.23.3 Bargaining Power of Suppliers
- 4.23.4 Threat of Substitutes
- 4.23.5 Competitive Rivalry

5 Market Size and Growth Forecasts (Value, USD)

5.1 End User Industry

- 5.1.1 Agriculture, Fishing, and Forestry
- 5.1.2 Construction
- 5.1.3 Manufacturing
- 5.1.4 Oil and Gas, Mining and Quarrying
- 5.1.5 Wholesale and Retail Trade
- 5.1.6 Others

5.2 Country

- 5.2.1 Indonesia
- 5.2.2 Malaysia
- 5.2.3 Thailand
- 5.2.4 Vietnam
- 5.2.5 Rest of ASEAN

6 Competitive Landscape

6.1 Market Concentration

6.2 Key Strategic Moves

6.3 Market Share Analysis

6.4 Company Profiles (Includes Global Level Overview, Market Level Overview, Core Segments, Financials as Available, Strategic Information, Market Rank/Share for Key Companies, Products and Services, and Recent Developments)

- 6.4.1 "K"Line Logistics, Ltd.
- 6.4.2 Bintang Baru Forwarding Sdn. Bhd.
- 6.4.3 DHL Group
- 6.4.4 Dimerco
- 6.4.5 EWT Logistics
- 6.4.6 Gemadept

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- 6.4.7 GEODIS
- 6.4.8 J&T Express
- 6.4.9 Kart Asia
- 6.4.10 Konoike Group (including Konoike Transport Co., Ltd.)
- 6.4.11 LOGISTEED, Ltd
- 6.4.12 Mitsui O.S.K. Lines
- 6.4.13 Nippon Express Holdings
- 6.4.14 Overland Total Logistic Services (M) Sdn Bhd
- 6.4.15 Profreight Group
- 6.4.16 SF Express (KEX-SF)
- 6.4.17 SUMISHO GLOBAL LOGISTICS (THAILAND) CO., LTD.
- 6.4.18 Team Global Logistics Co., Ltd.
- 6.4.19 Tiong Nam Logistics Holdings Bhd
- 6.4.20 Yatfai

7 Market Opportunities and Future Outlook

7.1 White-Space and Unmet-Need Assessment

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