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Asia Pacific Freight And Logistics - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2026 - 2031)

Market Report | 2026-02-09 | 443 pages | Mordor Intelligence

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Report description:

Asia Pacific Freight And Logistics Market Analysis

Asia-Pacific freight and logistics market size in 2026 is estimated at USD 2,868.36 billion, growing from 2025 value of USD 2,698.38 billion with 2031 projections showing USD 3,887.58 billion, growing at 6.27% CAGR over 2026-2031. Robust intra-Asian trade, the re-ordering of global supply chains, and policy-driven infrastructure upgrades position the Asia-Pacific freight and logistics market for sustained expansion. Manufacturing relocations into Southeast Asia, coupled with rising cross-border e-commerce volumes, are reshaping route density and service mix while tempering reliance on the traditional East-West mainline. At the same time, public-sector megaprojects are unlocking latent capacity in ports, highways, and rail links, reinforcing the long-term competitiveness of the Asia-Pacific freight and logistics market. Heightened climate and security risks are prompting shippers to diversify nodes and invest in digital visibility, supporting demand for higher-margin end-to-end logistics solutions across the Asia-Pacific freight and logistics market.

Asia Pacific Freight And Logistics Market Trends and Insights

Exploding E-commerce Parcel Volumes

Surging mobile adoption and marketplace penetration are pushing parcel counts to record highs across urban Asia. Leading CEP operators reported double-digit shipment growth in 2025, prompting rapid roll-out of automated sortation centers and micro-fulfillment hubs. Larger parcel densities are compressing unit delivery costs, enabling competitive pricing that further accelerates online spending. Urban governments are responding with curbside delivery zones and off-peak freight rules to manage congestion, indirectly reinforcing demand for technology-enabled last-mile platforms. Together, these forces are moving the Asia-Pacific freight and logistics market toward a higher-frequency, small-lot delivery paradigm.

Manufacturing Shift and Near-shoring into Southeast Asia

Foreign direct investment into ASEAN surpassed USD 329 billion in 2024, as electronics, automotive, and renewable-energy firms diversified production footprints away from single-country concentration. Vietnam's export growth and Thailand's Eastern Economic Corridor exemplify how modern industrial clusters are creating fresh flows of components and finished goods that require bonded warehousing, special-handling protocols, and synchronized multimodal capacity. As near-shored plants mature, backhaul imbalances are narrowing, unlocking rate efficiencies for carriers and forwarding agents across the Asia-Pacific freight and logistics market.

Fragmented Customs Regimes and Paperwork

Despite the ASEAN Single Window, disparate documentation rules still add several days to intra-regional transit. Logistics costs in some markets exceed 16% of GDP, driven largely by clearance delays and manual processes. While blockchain pilots and trusted-trader programs show promise, uneven implementation hinders scalability. Smaller exporters shoulder disproportionate compliance burdens, constraining their participation in the Asia-Pacific freight and logistics market. Progress toward harmonized digital customs standards remains a medium-term necessity.

Other drivers and restraints analyzed in the detailed report include:

Government Megaprojects Upgrading Ports, Rail and RoadsEnd-to-End Supply-chain Digitalization and Visibility ToolsChronic Congestion at Tier-1 Ports / Airports

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

Segment Analysis

Manufacturing's 35.74% revenue share in 2025 derives from electronics, automotive, and machinery chains requiring synchronized cross-border logistics. The segment anchors contract rates and builds base density for forwarders, warehousing providers, and carriers.

Wholesale and retail trade, however, is the fastest-expanding customer pool with a 6.62% CAGR (2026-2031). Omnichannel retailers rely on responsive fulfillment frameworks, driving investment in regional distribution centers, inventory postponement strategies, and returns management capacity. These needs are recasting service menus across the Asia-Pacific freight and logistics market.

Freight transport accounted for 60.12% of 2025 revenue share, underscoring its anchor role in the Asia-Pacific freight and logistics market size. Bulk flows of manufacturing inputs and finished goods keep full-truckload and container lanes dense, yet growth is tapering as demand shifts toward smaller, faster consignments.

Courier, express, and parcel revenues are projected to rise 6.74% CAGR between 2026-2031, powered by digital-commerce momentum and rising consumer service expectations. Integrators are retrofitting hubs with high-speed sorters and autonomous guided vehicles to process soaring parcel counts. Over time, modal allocation is expected to tilt further toward CEP, moderating freight transport's share of the Asia-Pacific freight and logistics market.

The Asia Pacific Freight and Logistics Market Report is Segmented by End User Industry (Agriculture, Fishing, and Forestry, Construction, Manufacturing, and More), by Logistics Function (Courier, Express, and Parcel (CEP), Freight Forwarding, Freight Transport, Warehousing and Storage, and Other Services), and by Country (China, India, Indonesia, Malaysia, Japan, and More). The Market Forecasts are Provided in Terms of Value (USD).

List of Companies Covered in this Report:

A.P. Moller - Maersk C.H. Robinson CJ Logistics Corporation DHL Group DP World DSV A/S (Including DB Schenker) Expeditors International of Washington, Inc. FedEx J&T Express JD Logistics Kuehne+Nagel LOGISTEED, Ltd. (Including Alps Logistics) NYK (Nippon Yusen Kaisha) Line SF Express (KEX-SF) SG Holdings Co., Ltd. Sinotrans, Ltd. Toll Group United Parcel Service of America, Inc. (UPS) XPO, Inc. YCH Group

Additional Benefits:

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

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