

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

Market Report | 2026-02-09 | 150 pages | Mordor Intelligence

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Report description:

Asia-Pacific Contract Logistics Market Analysis

Asia-Pacific Contract Logistics Market size in 2026 is estimated at USD 155.01 billion, growing from 2025 value of USD 147.74 billion with 2031 projections showing USD 197.12 billion, growing at 4.92% CAGR over 2026-2031.

The current Asia-Pacific Contract Logistics market size reflects the region's role as the global center for outsourced supply-chain management, and the forecast CAGR points to sustained momentum as shippers modernize fulfillment networks and extend value-added services. Rapid e-commerce expansion, large-scale near- and re-shoring, and government mega-investments in road, rail, port, and digital infrastructure are accelerating contract-logistics adoption across manufacturing, retail, and healthcare sectors. Long-term partnerships that align network design, automation, and data platforms continue to replace short-term, transactional arrangements, allowing providers to deliver resilient capacity in tight labor and real-estate environments. Rising marine-insurance premiums on congested South-China-Sea routes and persistent cold-chain bottlenecks in temperature-sensitive corridors add complexity, but they also create high-margin niches that reward providers capable of rigorous quality control and cross-border compliance.

Asia-Pacific Contract Logistics Market Trends and Insights

Explosive E-commerce Penetration Across Asia-Pacific

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Digital commerce growth is redefining fulfillment economics across the Asia-Pacific Contract Logistics market. Online sales velocity is forcing brands to adopt omnichannel inventory allocation, micro-fulfillment nodes, and dedicated reverse-logistics loops that most in-house networks cannot match. Indonesia and Vietnam record annual online-sales expansion far above brick-and-mortar growth, pushing warehouse developers to add mezzanine floors for pick-and-pack automation and temperature-controlled cells for premium groceries. Regional return rates often reach 15-30%, demanding refurbishment lines, re-boxing stations, and real-time visibility dashboards that contract-logistics providers now bundle into integrated propositions.

Near-/Re-shoring of Supply Chains ("China+1")

Multinational corporations are reallocating component sourcing and final assembly to Southeast Asia and India to diversify geopolitical risk and lower total landed cost. New production clusters in Vietnam's Northern Economic Zone and Indonesia's Batang Industrial Park demand inbound raw-material staging, just-in-sequence line feeding, and export consolidation that established providers can deliver from multi-country control towers. Dual-sourcing strategies require visibility across Chinese and non-Chinese plants, prompting shippers to hand over transport planning, milestone monitoring, and supplier-managed inventory to logistics specialists. Government programs such as India's Production-Linked Incentive scheme and Indonesia's Omnibus Law further accelerate factory relocations, locking in mid-term growth for the Asia-Pacific Contract Logistics market as new corridors mature.

Soaring Real-estate & Labor Costs in Tier-1 Hubs

Prime-grade warehouse rents rose sharply across Singapore, Hong Kong, and Tokyo in 2024, driven by constrained land supply and competing demand from data-center operators. Simultaneously, base wages for forklift drivers and order-pickers climbed in double digits in Australia and South Korea, eroding profit margins for high-volume operations. Contract-logistics providers mitigate these pressures through goods-to-person robotics, automated palletizers, and energy-efficient HVAC systems, but such upgrades require heavy capital outlays and lengthier payback periods. The economics encourage hub-and-spoke networks anchored in lower-cost satellite cities such as Johor Bahru and Chiba, yet last-mile cut-off times in megacities remain challenging, tightening service-level agreements and limiting rate increases in the near term.

Other drivers and restraints analyzed in the detailed report include:

Government Mega-spend on Logistics Infrastructure Outsourcing Focus of Manufacturers & Retailers Fragmented Standards & Permits Across Asia-Pacific Nations

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

Segment Analysis

The transportation slice of the Asia-Pacific Contract Logistics market generated 62.55% of revenue in 2025, anchored by dense road fleets in China and sprawling domestic maritime lanes in Indonesia. Providers orchestrate synchronized long-haul trucking, rail shuttles, and short-sea feeder loops to balance cost and speed across fragmented geography. Meanwhile, value-added services are expected to post the strongest 4.03% CAGR to 2031 as manufacturers seek postponement, kitting, and light-assembly capabilities inside regional distribution centers. Growing label-compliance complexity in consumer electronics pushes contract operators to install on-site print-and-apply lines, while fashion brands use in-warehouse sewing cells for rapid size adjustments that elevate sell-through rates. The shift broadens margins and reduces reliance on volatile linehaul rates, reinforcing the structural expansion of the Asia-Pacific Contract Logistics market size within higher-value niches.

Warehouse-and-distribution operations remain central, scaling with e-commerce parcel volumes and omni-inventory strategies.

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High-density shuttle systems reduce footprint in urban infill sites, whereas cross-docking layouts near seaports cut dwell time for temperature-sensitive produce. Progressive operators couple warehouse-management systems with real-time transport-visibility platforms, unlocking predictive arrival windows and exception alerts that sharpen customer experience. Airfreight forwarding volumes climb in parallel as direct-injection models for high-value parcels and biologics require multi-modal control from origin to doorstep, buttressing growth across the Asia-Pacific Contract Logistics market.

The Asia-Pacific Contract Logistics Market Report is Segmented by Service Type (Transportation, Warehousing & Distribution, and Value-Added Services), Contract Duration (1-3 Years and Above 3 Years), End-User Industry (Manufacturing & Automotive, , Retail & E-Commerce, Healthcare & Pharmaceuticals, Chemicals, and More), Country (China, India, Japan, Australia, and More). The Market Forecasts are Provided in Terms of Value (USD).

List of Companies Covered in this Report:

Deutsche Post DHL Group DSV CEVA Logistics UPS Supply Chain Solutions Logisteed Ltd CJ Logistics Nippon Express Co. Ltd Toll Group Yusen Logistics Co. Ltd Kuehne + Nagel Kerry Logistics Network Ltd Hellmann Worldwide Logistics Rhenus Logistics Geodis GAC Silk Contract Logistics Linc Group Rohlig Logistics Allcargo Logistics Ltd Broekman Logistics

Additional Benefits:

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

Table of Contents:

- 1 Introduction
 - 1.1 Study Assumptions & Market Definition
 - 1.2 Scope of the Study
- 2 Research Methodology
- 3 Executive Summary
- 4 Market Landscape
 - 4.1 Market Overview
 - 4.2 Market Drivers
 - 4.2.1 Explosive e-commerce penetration across Asia-Pacific
 - 4.2.2 Near-/re-shoring of supply chains ("China+1")
 - 4.2.3 Government mega-spend on logistics infrastructure
 - 4.2.4 Outsourcing focus of manufacturers & retailers
 - 4.2.5 EV battery gigafactories' in-plant logistics demand
 - 4.2.6 Digital customs platforms speeding cross-border flows
 - 4.3 Market Restraints
 - 4.3.1 Soaring real-estate & labour costs in tier-1 hubs
 - 4.3.2 Fragmented standards & permits across Asia-Pacific nations
 - 4.3.3 Cold-chain capacity bottlenecks for biologics
 - 4.3.4 Rising marine-insurance premiums in South-China-Sea lanes
 - 4.4 Value / Supply-Chain Analysis
 - 4.5 Regulatory Landscape

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- 4.6 Technological Outlook (Automation, AI, IoT, WMS)
- 4.7 Porter's Five Forces
 - 4.7.1 Threat of New Entrants
 - 4.7.2 Threat of Substitutes
 - 4.7.3 Bargaining Power of Buyers
 - 4.7.4 Bargaining Power of Suppliers
 - 4.7.5 Intensity of Competitive Rivalry
- 4.8 Government Initiatives & SEZ Landscape
- 4.9 Transport Corridors (Maritime, Rail, Road)
- 4.10 Insights on E-commerce (Domestic & Cross-Border)
- 4.11 Insights on Reverse Logistics
- 4.12 COVID-19 & Geo-Political Events Impact Review

5 Market Size & Growth Forecasts

- 5.1 By Service Type
 - 5.1.1 Transportation
 - 5.1.1.1 Road
 - 5.1.1.2 Rail
 - 5.1.1.3 Air
 - 5.1.1.4 Sea
 - 5.1.2 Warehousing & Distribution
 - 5.1.3 Value-added Services (Assembly, Labelling, Kitting)
- 5.2 By Contract Duration
 - 5.2.1 1 - 3 Years
 - 5.2.2 Above 3 years
- 5.3 By End-user Industry
 - 5.3.1 Manufacturing & Automotive
 - 5.3.2 Food & Beverage
 - 5.3.3 Retail & E-commerce
 - 5.3.4 Healthcare & Pharmaceuticals
 - 5.3.5 Chemicals
 - 5.3.6 Other Industries
- 5.4 By Country
 - 5.4.1 China
 - 5.4.2 India
 - 5.4.3 Japan
 - 5.4.4 South Korea
 - 5.4.5 Australia
 - 5.4.6 Singapore
 - 5.4.7 Malaysia
 - 5.4.8 Indonesia
 - 5.4.9 Thailand
 - 5.4.10 Rest of Asia-Pacific

6 Competitive Landscape

- 6.1 Market Concentration Analysis
- 6.2 Strategic Moves (M&A, JVs, Automation Cap-ex)

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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 & Services, and Recent Developments)

6.4.1 Deutsche Post DHL Group

6.4.2 DSV

6.4.3 CEVA Logistics

6.4.4 UPS Supply Chain Solutions

6.4.5 Logisteed Ltd

6.4.6 CJ Logistics

6.4.7 Nippon Express Co. Ltd

6.4.8 Toll Group

6.4.9 Yusen Logistics Co. Ltd

6.4.10 Kuehne + Nagel

6.4.11 Kerry Logistics Network Ltd

6.4.12 Hellmann Worldwide Logistics

6.4.13 Rhenus Logistics

6.4.14 Geodis

6.4.15 GAC

6.4.16 Silk Contract Logistics

6.4.17 Linc Group

6.4.18 Rohlig Logistics

6.4.19 Allcargo Logistics Ltd

6.4.20 Broekman Logistics

7 Market Opportunities & Future Outlook

7.1 White-Space & Unmet-Need Assessment

8 Appendix

8.1 GDP Distribution by Activity & Region

8.2 Capital-Flow Insights

8.3 External Trade Statistics

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