

## **Cambodia Freight And Logistics - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2026 - 2031)**

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### **Report description:**

Cambodia Freight And Logistics Market Analysis

The Cambodia freight and logistics market was valued at USD 1.41 billion in 2025 and estimated to grow from USD 1.46 billion in 2026 to reach USD 1.76 billion by 2031, at a CAGR of 3.72% during the forecast period (2026-2031). The Cambodia freight and logistics market is benefiting from record garment and footwear exports, sustained foreign direct investment into Special Economic Zones, and a USD 36.6 billion government master plan that is modernizing roads, ports, railways, and airports. Freight volumes are rising as the Phnom Penh-Sihanoukville Expressway cuts road transit times to two hours, while the July 2025 opening of Techo International Airport unlocks new air-cargo routes and draws premium shippers. International alliances such as the Regional Comprehensive Economic Partnership and a 2024 Cambodia-South Korea FTA are broadening trade lanes, and the USD 1.7 billion Funan Techo Canal promises a 30% cut in ocean-freight costs once operational. Competitive intensity is escalating as global players fold in scale, typified by DSV's combination with DB Schenker, even as informal border fees and an underbuilt rail network temper near-term efficiency gains.

Cambodia Freight And Logistics Market Trends and Insights

Surging Garment and Footwear Exports to US and EU Driving Logistics Volumes

Exports of textiles and apparel climbed to USD 13.92 billion in 2024, up 23% year on year, reinforcing a steady uptick in containerized volumes moving to North America and Europe. Just-in-time models push shippers toward faster modes, and factory

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clusters inside SEZs negotiate fixed-rate contracts with major ocean carriers to secure capacity during peak seasons. The Regional Comprehensive Economic Partnership widens duty-free access to 15 economies, easing tariff pressure on Cambodian exporters and amplifying demand for third-party logistics providers equipped with digital freight platforms.

#### Government-Led Infrastructure Upgrades Driving Growth

The USD 1.9 billion Phnom Penh-Sihanoukville Expressway reduces door-to-port trucking costs, supporting the Cambodia freight and logistics market as heavy haul operators redeploy fleets to higher-density corridors. Sihanoukville Autonomous Port's expansion dovetails with a USD 16 billion Bay of Lights plan that adds deeper berths and smart-yard automation. Techo International Airport, 90% complete, opens new perishables lanes for mango and banana exporters ready to pay air-freight premiums.

#### Underdeveloped Rail Network Limiting Multimodal Efficiency

Only 652 km of active track keeps rail's share at 1.66% of load picked (tons) in 2024, forcing shippers to lean on costlier road moves and capping multimodal savings. Despite a USD 10 billion rail revamp plan, the northeastern hinterland remains unreachable by rail, prolonging dependence on high-emission trucking.

Other drivers and restraints analyzed in the detailed report include:

Belt and Road Rail Rehabilitation Enhancing Regional Connectivity  
Cold-Chain Demand from Aquaculture and Agro-Processing  
Logistics Costs Elevated by Informal Fees and Border Delays

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

#### Segment Analysis

Wholesale and retail trade held 33.40% of 2025 spending, underpinned by Cambodia's rising middle-class consumption and omnichannel grocery chains scaling Phnom Penh warehousing. Manufacturing is the momentum segment, posting a 4.05% CAGR (2026-2031) as Chinese and South Korean investors inject USD 3.2 billion into SEZ green-field plants across textiles, e-bikes, and steel.

Construction logistics remain linked to mega-projects such as the metro rail build, whereas agriculture, fishing, and forestry leverage new cold-chain solutions to widen export baskets beyond rice. Cambodia's freight and logistics market share for the fledgling healthcare vertical grows as vaccine throughput rises.

Freight transport held a 60.15% stake in 2025, as export-oriented factories continue to dispatch bulk volumes to Sihanoukville and principal ASEAN gateways. The segment is growing at 3.68% CAGR between 2026-2031, aided by duty-free access under RCEP and upgraded expressways that reduce road wear. CEP, though only 8.05% of 2025 revenue, expands at 4.72% CAGR (2026-2031) as domestic e-commerce users climb toward 2.9 million by 2029. Warehouse and Storage, and Freight Forwarding both benefit from manufacturers outsourcing non-core activities, while value-added services rise as multinationals demand pick-and-pack and labeling functions close to plant sites.

In volume terms, freight tonnage aligns with Cambodia's freight and logistics market patterns, where road transport retains 68.60% of the load picked (tons), but CEP parcels post double-digit growth every quarter, driven by social-commerce sales to secondary cities. Cross-border CEP operators are piloting automated sorters near Bavet to streamline last-mile hand-offs into Vietnam.

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The Cambodia Freight and Logistics Market Report is Segmented by End User Industry (Agriculture, Fishing, and Forestry, Construction, Manufacturing, Wholesale and Retail Trade, Oil and Gas, Mining and Quarrying, and Others), and by Logistics Function (Courier, Express, and Parcel (CEP), Freight Forwarding, Freight Transport, Warehousing and Storage, and Other Services). The Market Forecasts are Provided in Terms of Value (USD).

List of Companies Covered in this Report:

A.P. Moller - Maersk Cambodia Post (CP) CBG Logistics (S) Pte, Ltd. CJ Logistics Corporation CMA CGM Group (Including CEVA Logistics) DHL Group DSV A/S (Including DB Schenker) FedEx J&T Express Kuehne+Nagel Phnom Penh Autonomous Port QM Express Co., Ltd. Rhenus Group SF Express (KEX-SF) SHA Transport Express Co., Ltd. Shipco Transport Sihanoukville Autonomous Port SV Trucking Co., Ltd. United Parcel Service of America, Inc. (UPS) WBJ Logistics Co., Ltd. ZTO Express

Additional Benefits:

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

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