ASEAN E-commerce Logistics Market Size & Share Analysis - Growth Trends and Forecast (2026 - 2031)

> **Industry:** E-Commerce Logistics & Warehousing (Logistics & Supply Chain)
> **Source:** https://www.mordorintelligence.com/industry-reports/asean-e-commerce-logistics-market
> **Scraped Date:** 2026-09-17

Executive Market Summary

Market Metric	Details
Base Market Size	USD 11.49 billion
Projected Forecast (2031)	USD 11.49 billion
Growth Rate (CAGR)	12.12 %
Largest Market Region	N/A
Fastest-Growing Region	N/A

Market Visualizations & Infographics

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![Major players in ASEAN E-commerce Logistics industry](images/chart_2.png)

![ASEAN E-commerce Logistics Market Size](images/chart_3.png)

![ASEAN E-commerce Logistics Market Share by Service Type, 2025](images/chart_4.png)

![ASEAN E-commerce Logistics Market Share by Delivery Speed, 2025](images/chart_5.png)

![ASEAN E-commerce Logistics Market Concentration](images/chart_6.png)

![Icon](images/chart_7.png)

![footer background image](images/chart_9.png)

![Mordor Intelligence on Facebook](images/chart_11.svg)

![Mordor Intelligence on Pinterest](images/chart_13.svg)

![Mordor Intelligence on Instagram](images/chart_14.svg)

![ESOMAR](images/chart_16.png)

![GPTW](images/chart_18.png)
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Comprehensive Research Analysis

Overview Points List Flex 49 Share Feature End

Market OverviewStudy Period | 2020 - 2031 |
Forecast Data Period | 2026 - 2031 |
Base Year Market Size (2025) | USD 10.25 Billion |
Market Size (2026) | USD 11.49 Billion |
Market Size (2031) | USD 20.37 Billion |
Growth Rate (2026 - 2031) | 12.12 % |
Market Concentration | Low |
Major Players*Disclaimer: Major Players sorted in no particular order

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Market Overview

ASEAN E-commerce Logistics Market Analysis by Mordor IntelligenceThe ASEAN E-commerce Logistics Market size was valued at USD 10.25 billion in 2025 and estimated to grow from USD 11.49 billion in 2026 to reach USD 20.37 billion by 2031, at a CAGR of 12.12% during the forecast period (2026-2031).

Platform consolidation, social-commerce momentum, and digital-payment ubiquity are accelerating parcel volumes, while infrastructure projects such as Indonesia’s Tol Laut corridor expand multimodal capacity. Same-day and cross-border services are the fastest-rising niches, supported by dark-store networks, AI-driven routing, and the partial roll-out of the ASEAN Single Window. Competitive intensity remains moderate as regional specialists, platform-owned arms, and global integrators battle for share; technology investment and neutral, multi-platform positioning increasingly influence contract awards. Structural headwinds labor shortages, regulatory fragmentation, and urban congestion taxes temper margins even as autonomous warehouses and electric two-wheelers alleviate cost pressures.

Key Report Takeaways* By service, transportation led with 62.55% of the ASEAN e-commerce logistics market share in 2025.
* Warehousing & fulfillment is projected to expand at an 8.09% CAGR through 2031.
* By business model, B2C held 68.20% share of the ASEAN e-commerce logistics market size in 2025.
* C2C transactions record the highest projected CAGR at 8.77% through 2031.
* By destination, domestic logistics commanded 62.70% share of the ASEAN e-commerce logistics market size in 2025, while cross-border flows are advancing at a 7.03% CAGR.
* By delivery speed, same-day fulfillment is growing at 7.39% CAGR through 2031.
* By product category, fashion & lifestyle captured 26.60% of the ASEAN e-commerce logistics market share in 2025; foods & beverages is expanding at 7.80% CAGR.
* Indonesia, the largest country market, accounted for 30.80% share in 2025; Vietnam posts the fastest growth at 6.22% CAGR to 2031.

Key Market Trends

Market Trends and InsightsDrivers Impact Analysis of ASEAN E-commerce Logistics Market*

Driver	% Impact on CAGR Forecast	Geographic Relevance	Impact Timeline
Accelerated growth of ASEAN-based e-commerce marketplaces	3.2%	Indonesia, Thailand, Vietnam, Philippines	Medium term (2-4 years)
Rapid expansion of BNPL & digital wallets boosting checkout-conversion	2.1%	Global ASEAN, strongest in Singapore, Malaysia	Short term (≤ 2 years)
Government-funded national logistics corridors	1.8%	Indonesia, Vietnam, Thailand	Long term (≥ 4 years)
Rising cross-border social-commerce flows within CLMV sub-region	1.5%	Cambodia, Laos, Myanmar, Vietnam	Medium term (2-4 years)
On-demand dark-store networks enabling 2-hour delivery windows	1.3%	Urban centers: Jakarta, Bangkok, Ho Chi Minh City, Manila	Short term (≤ 2 years)
Gen-AI-driven route-optimisation lowering per-parcel cost by >12%	1.1%	Technology-advanced markets: Singapore, Malaysia, Thailand	Medium term (2-4 years)

Source: Mordor Intelligence |

Competitive Landscape

Competitive Landscape

The ASEAN e-commerce logistics market exhibits moderate fragmentation. J&T Expre ss's decision to drop Shopee exclusivity unveiled vulnerability in single-platform reliance and triggered a reshuffle of lane volumes. Ninja Van anchors regional last mile but fights financial strain, evident in 2024 wage delays, as subsidised shipping erodes margins.

Differentiation pivots on tech depth. Providers deploying Gen-AI route optimisation cut per-parcel cost over 12% and uplift on-time rates to 97% in pilot metros. Robotics-rich warehouses process 50% more orders per square foot, allowing fulfillment specialists to underbid manual peers. Cross-border mastery compliance automation, multi-currency billing—emerges as the next frontier, especially with social-commerce merchants seeking frictionless export.

Regulations add gatekeeping layers: ISO 9001 mandates in Singapore and Malaysia restrict entry to smaller couriers, whereas Indonesia favours local licensing and data-hosting rules. Consolidation continues via M&A: Amilo bought Thailand's Sivadon, CJ Logistics allied with Ninja Van, and UPS partnered Ninja Van in Malaysia to fuse global reach with local know-how. Chinese giants JD Logistics and Cainiao scout ASEAN depots, raising the bar on automation and price transparency.

ASEAN E-commerce Logistics Industry Leaders* J&T Express

* Ninja Van

* Deutsche Post DHL Group

* Shopee Xpress

* Lazada Logistics

* *Disclaimer: Major Players sorted in no particular order

Scope Methodology P Space

For this study, the ASEAN e-commerce logistics market is defined as revenue earned from moving, storing, and handling parcels tied to online orders across ASEAN, including line haul, last mile, fulfillment warehousing, returns, and related value-added activities used to complete delivery.

Scope exclusions: This sizing excludes the value of goods sold online and excludes pure digital services that do not involve physical logistics execution.

Segmentation Container

* By Service* Transportation* Road
* Rail
* Air
* Sea

* Warehousing and Fulfilment
* Value-Added Services (Labelling, Packaging, Kitting)

* By Business Model* B2C
* B2B
* C2C

* By Destination* Domestic
* Cross-border (international)

* By Delivery Speed* Same-day (less than 24 h)
* Next-day (24-48 h)
* Standard (3-5 days)

* Others (more than 5 days)

* By Product Category* Foods and Beverages
* Personal and Household Care
* Fashion and Lifestyle (accessories, apparel, footwear)
* Furniture
* Consumer Electronics and Household Appliances
* Other Products

* By Country* Indonesia
* Thailand
* Vietnam
* Philippines
* Malaysia
* Singapore
* Rest of ASEAN (Cambodia, Laos, Myanmar, Brunei)

Frequently Asked Questions

What is the current value of the ASEAN e-commerce logistics market?

The market is valued at USD 11.49 billion in 2026 and is projected to reach USD 20.37 billion by 2031.

Which service segment is growing the fastest?

Warehousing & fulfillment leads growth with an 8.09% CAGR as dark-store and automation investments rise.

How fast is cross-border e-commerce logistics expanding?

Cross-border flows are forecast to advance at a 7.03% CAGR, driven by social-commerce integration and customs digitalization.

Why are digital wallets important for logistics operators?

Wallets settle 34% of sector payments, reduce checkout friction, and require carriers to manage real-time fund splits.

Which country shows the highest growth momentum?

Vietnam posts the fastest national CAGR at 6.22%, supported by manufacturing exports and rising domestic GMV.

How does labor availability affect logistics costs?

Chronic shortages, especially in tier-2/3 cities, lift wages and training spend, reducing margins until automation scales.