

How Is Malaysia Courier And Parcel Market Positioned?

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Courier and Parcel Market is a part of the overall logistics industry which deals with time-bound logistics services. It involves the movement and transport of documents, parcels, goods, materials, and products which includes activities including freight, storage, packaging and inventory management. The delivery time for a standard package to be delivered via express logistics domestically within Malaysia usually ranges between 24 to 48 hours. The growing industrialization and busy lifestyles have increased the requirement for faster delivery. This gave the logistics industry an opportunity to launch a new service vertical named express logistics which was a faster way of delivery compared to the normal delivery. The courier and parcel market was witnessed to grow at a CAGR of ~% during the period 2013-2018 in Malaysia. The rising prominence of online shopping has attributed to the increasing demand for express delivery, especially by B2C segments in the past few years in the country.

Malaysia Courier and Parcel Market Segmentation

By Air and Ground Express: Ground express logistics dominated the Malaysia courier and parcel market with a volume share of ~% in 2018 as the majority of the demand arising can be met through road transport. The cost of air express is higher than the ground express which has resulted in the lower volume share of air express services. This segment accounted for the remaining ~% of the market share by volume. Companies prefer air express only when it takes lesser time as compared to ground logistics.

The market share acquired by them was evaluated to be ~% in the year 2018. Due to the low international demand for Malaysian products requiring courier and parcel delivery, international courier and parcel delivery was expected to acquire the remaining, much lesser revenue share of ~% in the year 2018.

By Delivery Period: Majority of the deliveries was identified to be two-day deliveries. Thus, the revenue share acquired by them was evaluated to be ~% in 2018. The second leading category was identified to be more than three-day delivery which had acquired ~% of the market share. The remaining ~% of the market share was split between one-day deliveries and three-day deliveries.

By Market Structure: B2B segment dominated the courier and parcel market in Malaysia during 2018 with

~% as the revenue share. The businesses require their goods to be delivered within a specific time frame which is usually less than or equal to 72 hours. B2C was evaluated to be the second leading category in the courier and parcel market with a revenue share of ~% in the year 2018. The revenue of this segment comes primarily from the e-commerce market and the online grocery and foods delivery market in the country. C2C segment was evaluated to cater to the remaining ~% revenue share in the courier and parcel market of Malaysia in 2018. C2C services are a customer to customer express services and it includes the deliveries made from one customer to another customer.

By Region: As per the latest census figures of 2018, the population of Malaysia were evaluated at 32.4 million. In 2018, the central region accounted for a massive ~ % market share in terms of shipments.

The region includes state of Selangor and federal territories of Kuala Lumpur and Putrajaya. Southern region followed up with a volume share of ~ % in the Malaysia courier and parcel market in 2018. The region includes state of Johor, Malacca and Negeri Sembilan. The northern region contributed to a market share of ~ % in terms of shipments in the Malaysia courier and parcel market in 2018. This region includes the state of Perlis, Kedah, Penang, and Perak. Eastern or East Coast of Peninsular Malaysia and East Malaysia captured the remaining share of ~ % in terms of shipments in the courier and parcel market in 2018. East coast of Peninsular Malaysia includes the state of Kelantan, Terengganu and Pahang whereas East Malaysia includes the state of Sabah and Sarawak.

By Onshore and Offshore: Onshore courier and parcel deliveries were witnessed to acquire a higher revenue share of ~% in the market in 2018. The offshore shipments were witnessed to acquire the remaining ~% of the market share of the couriers and parcels market. In the case of Malaysia's courier and parcel market, the freight usually involves offshore delivery whereas mail is witnessed to have an onshore delivery system.

Future Outlook

Courier and Parcel market in Malaysia is expected to grow at a CAGR of ~% during the period 2018-2023E. The high growth rate in this sector can be attributed to the growing e-commerce sector, increasing demand for perishable goods and the rising digitization in the country. The consistently growing e-commerce industry will drive the courier and parcel market owing to the rising demand for this service for B2C segment.

How Is Malaysia E-Commerce Logistics Market Positioned?

The e-commerce industry of Malaysia has been growing at a significantly fast rate. The improving lifestyle of people year on year, the growing number of smart phone users' year on year and the rising internet users in the country has led to a positive impact on the e-commerce market of the country. The e-commerce logistics market was witnessed to grow at a ~% from 2017 to 2018. The revenue generated in the market increased from MYR ~ million in 2017 to MYR ~ million in 2018.

Malaysia E-Commerce Market Segmentation

By Delivery Period: The delivery periods for products ordered online may vary from product to product or company to company. The market can be segmented on the basis of the same day delivery, next day delivery and two or more than two-day delivery. The leading the segment in this category was analyzed to be Next Day Delivery which accounted for around ~% market share by itself indicating providence of express logistics. It was followed by two or more than two-day delivery which accounted for ~ % market share in the ecommerce logistics market. The e-commerce market exploded in Malaysia in the last few years and witnessed the emergence of multiple startups during the period.

Malaysia E-Commerce Market Future Outlook

E-commerce market is expected to continue growing in Malaysia in the coming years. The increasing digitization in the country has significantly impacted the growth of the country and especially the e-commerce sector. The market for e-commerce is expected to grow at a CAGR of ~% during the period 2018-2023E as the revenue from the market is expected to increase from MYR ~ million in 2018 to MYR ~ million in 2023.

Key Segments Covered:-

Logistics and Warehousing:

By Service Mix (Freight Forwarding, Warehousing and Courier and Parcel Activities)

Freight Forwarding:-

By Mode of Service (Land Freight, Sea Freight and Air Freight)

By Mode of Freight (Domestic and International Freight Forwarding)

By Flow Corridors (Asian Countries, North American Countries, European Countries and Others)

By End Users (Food and Beverages, Automotive, Manufacturing and Others)

By Third Party Logistics and Integrated Logistics

Courier and Parcel:-

By Air and Ground Express

By Domestic and International Shipments

By Delivery Period (One Day Delivery, Two Day Delivery, Three Day Delivery and More than Three Day Delivery)

By Intra City and Inter City

By Market Structure (B2B, B2C and C2C Segments)

By Region (Central, Southern, Northern, Eastern Coast & East Malaysia)

By Onshore and Offshore Shipments

E-Commerce:

By Delivery Period (Same Day Delivery, Next Day Delivery, Two Day and More than Two Day Delivery)

By Area of Delivery (Intracity and Intercity Shipments)

Third Party Logistics:

By Service Mix (Freight Forwarding and Warehousing)

Warehousing:

By Business Model (Industrial/Retail, Container Freight/Inland Container Depot and Cold Storage)

By Geography (Central, Southern, Northern and Eastern Coast & East Malaysia)

By Type of Warehouses (Closed Warehouses and Open Yards)

By Third Party Logistics and Integrated Logistics

By End Users (Food and Beverages, Manufacturing, Automotive, Consumer Retail and Others)

Cold Chain

By Cold Storage and Cold Transport

Key Target Audience:-

Logistics Companies

Warehousing Companies

Cold Chain Companies

Courier and Parcel Companies

Express Logistics Companies

E-Commerce Logistics Companies

E-Commerce Companies

Logistics Association

Government Association

Investors and Private Equity Companies

Time Period Captured in the Report:-

Historical Period: 2013-2018

Forecast Period: 2019-2023

Key Companies Covered:-

Freight Forwarding and Warehousing Market:-

DHL

Kuehne + Nagel

Tiong Nam Logistics

TASCO Berhad

CEVA Logistics

DB Schenker

Agility Logistics

CJ Logistics

POS Malaysia

Nippon Express

DKSH

FedEx

Courier and Parcel Market

POS Malaysia

GD Express

E-Commerce Logistics Market

Lazada Express

Ninja Van

POS Logistics

DHL E-Commerce

The Lorry

Skynet

ABX Express

J&T Express

Key Topics Covered in the Reports:-

Major Players Express Delivery Malaysia

Warehousing Services in Malaysia

Warehousing Type Malaysia

Malaysia Cold Storage Warehouse

Third Party Logistics Malaysia

Malaysia Logistics Industry

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