Philippines Logistics Market Outlook to 2020 - Driven by Customized Logistics, E-commerce Activities and Changes in Freight Forwarding

Description: The report titled “Philippines Logistics Market Outlook to 2020 - Driven by Customized Logistics, E-commerce Activities and Changes in Freight Forwarding” provides a comprehensive analysis of logistics market in Philippines. The report covers various aspects such as market size (transaction volume, revenue generated, cargo handled) of logistic market, domestic and international express delivery, third party logistics, e-commerce logistics, Filipino Freight Forwarding and Balikbayan Box Market. The report also provides competitive landscape and profiles of major players operating in Logistic market of Philippines. The future analysis of overall Philippines Logistic market and by segments has also been discussed in each of the subsegment. The report is useful for domestic and International logistic players, e-commerce logistics companies, freight forwarding companies and other stakeholders to align their market centric strategies according to ongoing and expected trends in the Logistic industry.

Philippines Logistics Market:

Philippines logistics market has evolved in recent years with the rising globalization which is one of the key driving factors responsible for the growth of logistics market. The total logistics market recorded transaction volume worth USD ~ million in 2015 which grew from USD ~ million in 2010. The third party logistics market in the Philippines has observed an increase in revenues from USD ~ million in 2010 to USD ~ million in the year 2015 at a CAGR of ~ during 2010-15. The strong economic growth in the country has driven the logistics sector thereby leading to an increased demand of efficient distribution channels in the country. The growth of export and import activities in the Philippines has significantly contributed to the growth of logistics market. The key service offered by the logistics service providers in the Philippines included the movement of documents, parcels, freight within a definite transit time. Philippines logistics market is segmented by industry type and includes freight transport by road, sea and air, storage and warehousing, and value added services. The logistics market in the country was largely dominated by road freight forwarding industry in 2015. Freight transport by road has been mainly utilized for domestic transport of goods and commodities by various industry sectors in the Philippines.

The demand of logistics services in which orders have been placed online through booking through the internet, has gained little popularity amongst the masses. The revenue generated in the ecommerce logistics segment of the Philippines logistics industry witnessed an increase from USD ~ million in 2009 to USD ~ million in 2015.

Express Delivery Market:

Express delivery which comprises of services for documents, mails, parcels and couriers at a premium price for faster delivery times has gained significant popularity amongst the Filipino population. The express delivery systems have created a door to door linkage across domestic and international markets and have developed advanced shipment tracking facilities to cater to the time sensitive needs of the logistics sector. In the year 2009, the express delivery market in the Philippines was recorded as USD ~ million. During this year, these services were observed to comprise ~% of the overall logistics and freight forwarding market. The infrastructural growth and development in the country has complemented the express delivery market in the country with an escalated preference of business and consumers to transport goods in shorter amount of time. The express delivery market registered a CAGR of ~% during the time period 2010-2015.

The Philippines express sector has majorly utilized two modes of transportation, namely, air and road networks. In the year 2015, road express systems registered the major share of the express delivery market with a percentage share of ~% by revenues.

The air express comprised of only ~% market share. One of the major reasons of the lower share of air express has been the low traffic capacity and less number of orders for same day delivery due to higher logistics cost relative to reasonable cost normal delivery/courier/parcel services.

In the year 2015, the revenue generated from the international express delivery market of the Philippines was recorded at USD ~ million. DHL was observed as the major player with a market share of ~% in terms of revenues and was followed by FedEx at ~%. A larger volume of trade has been observed to take place with
the availability of international express delivery services. It can also be noticed that international express services comprises of ~% of the market in 2015. A higher share of international express services has been accounted for a large number of B2B transactions.

Philippines Balikbayan Box Market:

The Balikbayan box market has been observed to increase from USD ~ million in 2010 to USD ~million in 2015. Despite of a large number of Filipinos working in foreign nations, this market has grown at a CAGR of ~%. The major factor that has been responsible for the slow growth of Balikbayan box market has been a reduction in shipments. Variables such as global economic recession and delayed shipments have swayed foreign workers to deliver Balikbayan boxes themselves on a visit to the native country. Balikbayan boxes are basically ridged container boxes which contain various goods sent by overseas Filipino workers, also known as Balikbayans, to the homeland. Balikbayan boxes have been majorly standardized into three sizes, namely, medium (18x16x18 inches), large (18x18x24 inches) and extra large (24x18x24 inches). The size of these boxes has been confined to certain dimensions to obtain better packaging and easier logistic services.

E-commerce Logistics Sector:

The Philippines e-commerce logistics market has showcased steady growth over the years. The market has witnessed an astounding compounded annual growth rate of ~%. This segment has witnessed an increase in revenues from USD ~million in 2010 to USD ~million in 2015. The major factor behind the immunity of this industry during a slump in the international market was the high local demand from the Filipino population. The growing awareness among consumers about global brands as well as preferences for improved and up to date fashion and technologies has heightened the demand. Use of advanced mobile applications and banking solutions for the customers has made it easier for them to shop online which further intensified the e-commerce logistics market.

Filipino Freight Forwarding Market:

The freight forwarding market registered revenues worth of USD ~ million in the year 2010 and expanded to USD ~million by 2015, growing at a CAGR of ~% during this period. The steady increase in trade volumes in the past five years has supported the elevation of freight forwarding sector. Road transport has played a key role in handling freight movement in the country. The total revenue generated by the road freight forwarding market has grown at a CAGR of ~% during 2010-2015. Freight transport by road market witnessed transaction volume worth USD ~million in 2010, which grew to USD ~million in 2015.

The total revenue generated by the Philippines sea freight forwarding market in 2015 was USD ~million. The market has grown at a CAGR of ~% during 2010-2015. The sea freight market held a share of ~% in the logistics market in the Philippines during 2015.

Air freight forms an essential part of the logistics market in the Philippines, providing an important link between the capital cities and economic hubs in the country, and major destinations across the world. The revenue generated by the air freight forwarders reached USD ~million in 2015, growing from USD ~million in 2010. The overall air freight market in the Philippines has grown at a CAGR of ~% during 2010-2015.

Third Party Logistics Market:

The third party logistics market in the Philippines has observed an increase in revenues from USD ~ million in 2010 to USD ~million in the year 2015 at a compounded annual growth rate of ~% during the time period 2010-2015. Third party logistics market has evolved significantly over the period of 2010-2015 as a result of globalization. The key 3PL providers in the country are Fast Logistics Group, Li and Fung Limited, Synnovate Logistics and DHL Supply Chain. Fast Logistics Group is one of the leading 3PL players in the Philippines.

The Third Party Logistics market in the country has been observed as a critical support to the overall logistics and express delivery industry in the Philippines. The market has been projected to grow at a CAGR of 12.3% during 2015-2020. With the increasing globalization, a large number of multi-national companies are expected to source and manufacture goods on a large scale globally.

Key Topics Covered in the Report:

- The market size of the Philippines Logistic market.
- Market segmentation of the Philippines Logistic market on the basis Type of services, By B2B and C2C
clients
- The market size of Philippines Warehousing and Value Added Services.
- The market size of Philippines Cargo Handling Market
- The market size of the E-commerce Logistic.
- The market size of Philippines Third Party Logistics Market
- Logistics and Forwarding Market Entry Barriers
- The market size of Filipino Freight Forwarding Market
- Market segmentation of the Filipino Freight Forwarding market on the basis of Road Freight, Air Freight, Sea Freight.
- Market Share of Major Players in Domestic Air Freight Forwarding Market
- Market Share of Major Players in International Air Freight Forwarding
- Market Share of Major Players in Sea Freight Forwarding Market
- Philippines Balikbayan Box Market size
- Market segmentation of the Balikbayan Box Market by Seasonal demand
- Philippines Express Delivery Market
- Market segmentation of the Express Delivery Market on the basis of Domestic express delivery market and International express delivery market
- Competitive landscape of major companies in Domestic express delivery market
- Competitive landscape of major companies in International express delivery market
- Market Drivers and trends of Philippines Logistic market
- Future outlook and projections of Philippines Logistic market on the basis of - Domestic market and International market
- Analyst Recommendation
- Macro Economic factors
- Philippines Infrastructure segmentation by Road network, Airport and ports

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