ASEAN Automotive Logistics Market Report 2026-2036

Emerging ASEAN nations present strategic growth opportunities for LSPs, OEMs, and Tier suppliers

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Executive summary

1.1 Introduction

The ASEAN region is coming under increasing strategic focus.

Whilst constituting only around 4% of global vehicle production volumes in 2024, the ASEAN region is emerging as a dynamic emerging region attracting investment from OEMs, tier suppliers and logistics providers alike.

This is because as the world appears to be moving towards a more protectionist trading model, the ASEAN region is perceived as a relatively politically neutral 'bridge' between Western and Eastern automotive markets.

Many Western OEMs perceive the ASEAN region as a key option within their 'China +1' strategy to multisource vehicle components and locate vehicle assembly plants in a relatively stable economic region with lower tariff barriers to alleviate supply chain disruption and thereby boost resilience.

Furthermore, whilst the ASEAN region is not quite yet achieving the critical mass necessary, it is trying to escape the gravitational pull of the much larger Chinese market, and become more of its own regional automotive production hub.

Nonetheless, the ASEAN region has many challenges including constraints due to its mainly island geography. There are also infrastructure challenges due to lack of investment.

ASEAN (Association of South-East Asian Nations) is an organisation of 10 key nations including: Brunei Darussalam, Cambodia, Indonesia, Lao PDR, Malaysia, Myanmar, Philippines, Singapore, Thailand, and Vietnam. However, it is primarily the ASEAN-6 i.e. Indonesia, Thailand, Vietnam, Malaysia, Philippines, and Singapore that constitute significant automotive production, and automotive logistics operations.

So what are the ASEAN automotive logistics market trends?

Executive summary

Table 1.1 ASEAN automotive logistics market trends

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- Supply chain complexity and the push for integration
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Cross-border logistics and regulatory complexity

ASEAN's geography is dominated by island nations and presents inherent logistical challenges. Although the ASEAN Free Trade Area (AFTA) and Regional Comprehensive Economic Partnership (RCEP). has helped reduce tariffs and promote regional integration, regulatory fragmentation remains a hurdle.

Each ASEAN country has distinct customs procedures, trade policies, and logistics regulations, complicating and slowing down cross-border movement of vehicles and components. Multimodal transport is often required, and border crossings can be slow and bureaucratic – especially for OEMs operating regional supply chains with time-sensitive automotive components. To address this, LSPs are working to harmonise standards, streamline documentation, and invest in multimodal transport solutions to improve efficiency.

Electrification & battery supply chain transformation

ASEAN governments are actively promoting electric vehicle (EV) adoption through incentives and infrastructure development. In the ASEAN-6 in 2024, EVs represented 13% of passenger vehicle sales, up from 9% in 2023. This growth is driving further investment in EV production, with Thailand and Indonesia leading the way, followed by Malaysia and Vietnam.

The rise of EVs is also reshaping supply chains, creating demand for specialised logistics services such as battery handling, temperature-controlled transport for hazardous materials, reverse logistics, finished vehicle logistics, and also charging infrastructure logistics. These changes are prompting a wider transformation in automotive logistics planning and execution across ASEAN.

Supply chain complexity and the push for integration

Automotive supply chains in ASEAN are fragmented, multi-tiered, and regionally dispersed with poor integration between suppliers, logistics providers, and manufacturers. This leads to limited real-time visibility communication breakdowns, inefficiencies and delays.

Furthermore, these inefficiencies are exacerbated by the rapid growth of EV production and need for tighter coordination. Many plants rely on completely knocked down (CKD) kits, The influence of Japanese, South Korean, and increasingly Chinese OEMs adds further complexity. To address these challenges, there is a growing push for resilient and integrated supply chains. Regionalisation and localisation of supply chains are seen as key strategies to improve efficiency and reduce dependency on external sources

Asean as a regionalised offshore manufacturing hub

The "China Plus One" strategy is encouraging manufacturers to diversify and shift production to ASEAN countries with the aim to become a key regionalised offshore automotive manufacturing hub. This approach helps mitigate risks from tariffs and geopolitical tensions while leveraging ASEAN's cost advantages.

Vietnam and the Philippines are seeing rapid growth in vehicle sales and are being integrated into regional supply chains. Local assembly and parts manufacturing are being prioritised to strengthen resilience and reduce lead times. However, while governments are pushing for localisation to support EV manufacturing, many countries lack the necessary ecosystems (e.g. battery plants, skilled labour, charging infrastructure). This creates a mismatch between policy ambitions and operational realities, slowing down logistics optimisation.

Executive summary

Infrastructure gaps and investment needs

Despite ongoing investments, many ASEAN countries still face underdeveloped transport infrastructure with quality varying widely across the ASEAN region. While countries like Thailand, Malaysia, and Singapore have advanced logistics infrastructure, others such as Myanmar, Laos, and Cambodia face significant challenges including limited and poor-quality road connectivity, congested ports & disrupted routes (e.g., Strait of Malacca), and limited rail networks.

These gaps increase transportation costs and delivery times. These bottlenecks are particularly critical for time-sensitive EV components and finished vehicle deliveries. In response, ASEAN nations are investing heavily in infrastructure upgrades - port expansions, improved rail connectivity, and logistics parks - to support growing vehicle volumes and regional trade. Thailand and Vietnam, in particular, are expanding bonded zones and logistics hubs to attract OEMs and Tier 1 suppliers.

Vehicle sales growth & automotive logistics demand

Vehicle sales across ASEAN are on an upward trajectory, particularly in countries with strong economic growth. This is driving investment in vehicle production capacity, supply chains, and supporting infrastructure. As a result, demand for automotive logistics services is rising. LSPs are expanding capabilities to support growing volumes, while OEMs are scaling operations to meet market needs. This growth reinforces the importance of efficient logistics networks and regional integration to support the automotive sector's expansion.

Shifting OEM landscape: Chinese OEMs challenging Japanese dominance

Japanese OEMs have long dominated the ASEAN automotive market, with limited involvement from European and US brands. However, a significant shift is underway. Chinese EV brands like BYD and Chery are rapidly gaining market share, leveraging competitive pricing and advanced software-defined vehicles.

South Korean OEMs such as Hyundai and Kia are also expanding their presence. This disruption is prompting changes in logistics planning, including new battery supply chains, charging infrastructure, and distribution models tailored to EVs. The rise of Chinese and Korean OEMs is reshaping the competitive landscape and logistics strategies across ASEAN.

Strategic alliances, partnerships, & market divergence

ASEAN's automotive market are experiencing uneven growth. Countries like Indonesia, Vietnam, and the Philippines are showing positive trends, while Thailand faces economic headwinds, including tighter vehicle loans and declining sales. EV adoption is also progressing at different rates across the region. To navigate this complexity, multinational logistics companies are forming strategic alliances with regional players. Automotive firms are partnering with logistics providers, technology companies, and governments to co-develop infrastructure such as EV charging networks and smart distribution centres. Mergers and acquisitions are also being used to expand service capabilities and geographic reach.

Labour and skills shortages

A shortage of skilled logistics professionals and drivers in many ASEAN countries is hindering the implementation of advanced logistics solutions. These gaps affect the management of complex supply chains and contribute to freight rate fluctuations, impacting delivery times and overall logistics costs.

Digital transformation in automotive logistics

ASEAN's automotive logistics sector is gradually embracing digitalisation to overcome inefficiencies caused by manual processes and fragmented legacy systems. Companies are adopting AI, control towers, and smart logistics networks for real-time tracking and predictive analytics. Technologies like automated storage systems, smart warehouses, robotics, IoT-enabled inventory management, digital twins, and blockchain are being explored to enhance transparency, reduce errors, and optimise supply chain visibility.

Rise of third-party logistics providers (3PLs)

The entry of Chinese and South Korean automotive brands into ASEAN is driving the expansion of 3PLs. These providers offer specialised logistics services, enabling OEMs to focus on core operations. Strategic partnerships and collaborations among logistics firms are strengthening market positions and supporting growth in the ASEAN automotive logistics sector.

Economic and geopolitical headwinds

Rising interest rates, inflation, and global trade tensions (especially the US – China axis) are impacting investment flows, production planning and strategic decision making.. These macroeconomic factors contribute to demand volatility and complicate long-term logistics strategies for automotive players in the ASEAN region.

Sustainability pressures

Governments and OEMs are pushing for greener logistics practices, including EV fleets, carbon-neutral warehousing, and eco-friendly packaging. Despite infrastructure and cost challenges, there is growing momentum towards sustainable production and circular economy models in automotive logistics.

2. ASEAN automotive production forecast 2026-2036

ASEAN automotive production forecast by country

2.1 ASEAN automotive production forecast analysis

ASEAN region

Overall ASEAN production volumes, of course were severely impacted during the Covid pandemic of 2020-2021. However, after recovering in 2020-2023, volumes dropped significantly in 2024 to 3.91m due to economic headwinds automotive loans. However, volumes are expected to recover to 4.43m in 2026, and grow to 7.22m in 2036 with a 5% CAGR.

High production footprint

Thailand. Thailand's automotive production was 1.97m in 2019, dropping to in 2024 to 1.47m, but is expected to increase from 1.77m in 2026 to 2.56m in 2036 at a CAGR of 3.8%.

Indonesia. Indonesia's automotive production was 1.22m in 2019, dropping in 2024 to 1.19m, but is expected to increase from1.38m in 2026 to 2.68m in 2036 at a CAGR of 6.9%.

Medium production footprint

Malaysia. Malaysia's automotive production was 0.61m in 2019, increasing in 2024 to 0.79m, but is expected to increase from 0.77m in 2026 to 0.98m in 2036 at a CAGR of 2.5%.

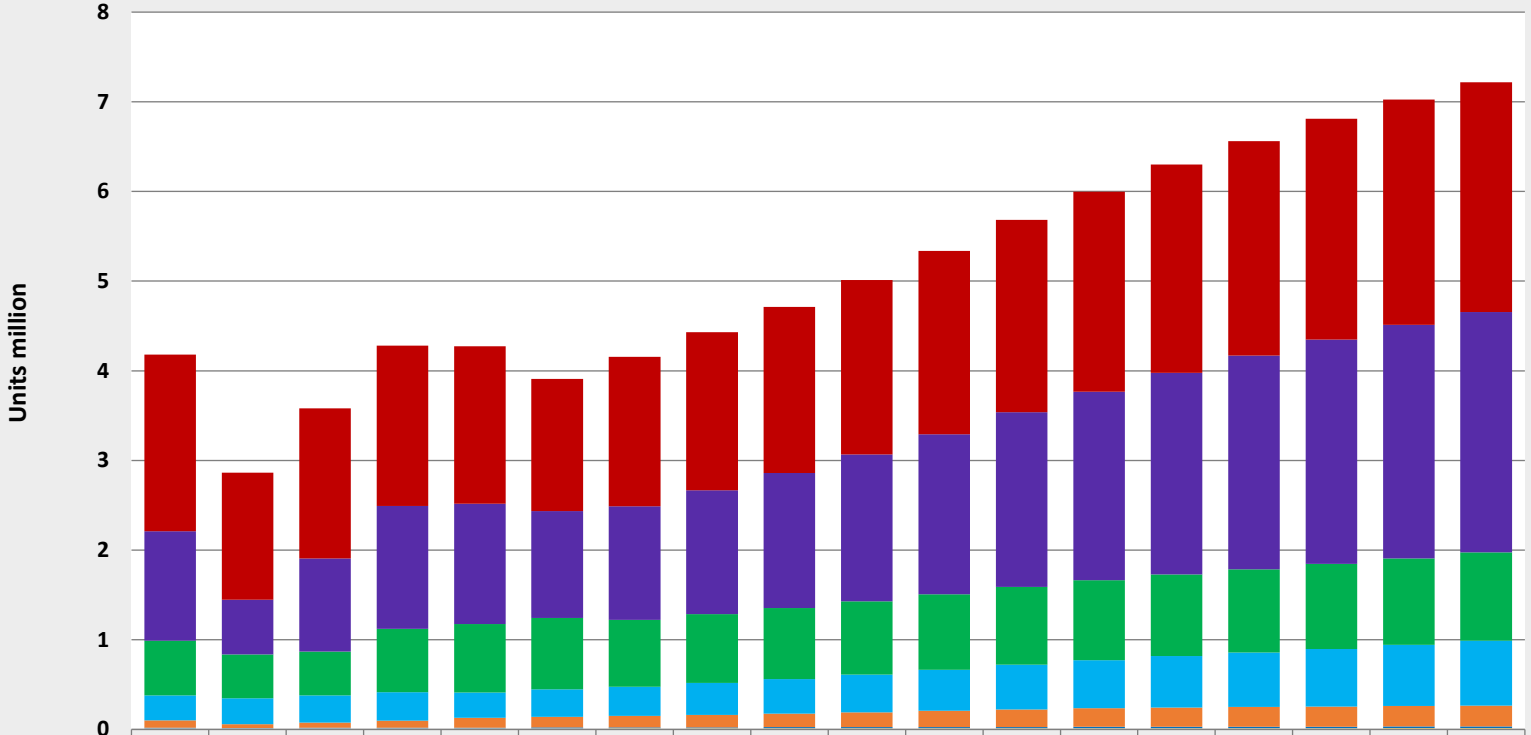
Vietnam. Vietnam's automotive production was 0.28m in 2019, increasing in 2024 to 0.31m, but is expected to increase from 0.35m in 2026 to 0.72m in 2036 at a CAGR of 7.4%.

Low production footprint

Philippines. The Philippines's automotive production was 0.08m in 2019, increasing in 2024 to 0.11m, but to increase from 0.14m in 2026 to 0.23m in 2036 at a CAGR of 5.4%.

Singapore. Singapore's automotive production is very low level, and while it is expected to increase over the forecast period, it will still remain at very low volumes.

Figure 2.1 ASEAN automotive production forecast by country 2026-2036 (units millions)



	2019	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	2031	2032	2033	2034	2035	2036
Thailand	1.97	1.42	1.67	1.79	1.76	1.47	1.67	1.77	1.85	1.95	2.04	2.15	2.23	2.32	2.39	2.46	2.51	2.56
Indonesia	1.22	0.61	1.04	1.37	1.34	1.19	1.27	1.38	1.50	1.64	1.79	1.95	2.10	2.25	2.39	2.50	2.60	2.68
Malaysia	0.61	0.49	0.49	0.71	0.76	0.79	0.75	0.77	0.79	0.82	0.84	0.87	0.89	0.91	0.93	0.95	0.97	0.98
Vietnam	0.28	0.29	0.30	0.31	0.28	0.31	0.32	0.35	0.39	0.42	0.46	0.50	0.53	0.57	0.61	0.64	0.68	0.72
Philippines	0.08	0.04	0.06	0.08	0.11	0.12	0.13	0.14	0.15	0.17	0.18	0.20	0.21	0.22	0.22	0.23	0.23	0.23
Singapore	0.01	0.01	0.01	0.01	0.01	0.01	0.01	0.01	0.01	0.01	0.02	0.02	0.02	0.02	0.02	0.02	0.02	0.02
Other	0.01	0.01	0.01	0.01	0.01	0.01	0.01	0.01	0.01	0.01	0.01	0.01	0.01	0.01	0.01	0.01	0.01	0.01

Source: Automotive Logistics / OICA

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3. ASEAN automotive logistics market forecast 2026-2036

ASEAN automotive logistics forecast

3.1 ASEAN automotive logistics market analysis

Definition :

ASEAN (Association of South-East Asian Nations) is an organisation of 10 key nations including: Brunei Darussalam, Cambodia, Indonesia, Lao PDR, Malaysia, Myanmar, Philippines, Singapore, Thailand, and Vietnam. However, it is primarily the ASEAN-6 i.e. Indonesia, Malaysia, Philippines, Singapore, Thailand, and Vietnam that constitute significant automotive production, and automotive logistics operations.

Analysis :

Accounting for ~3.5% of the global automotive logistics market, the ASEAN automotive logistics market is valued at $10.61bn in 2025 and is expected to grow from $11.6bn in 2026, with a robust growth rate of 8.0% (CAGR) to reach $24.96bn by 2036.

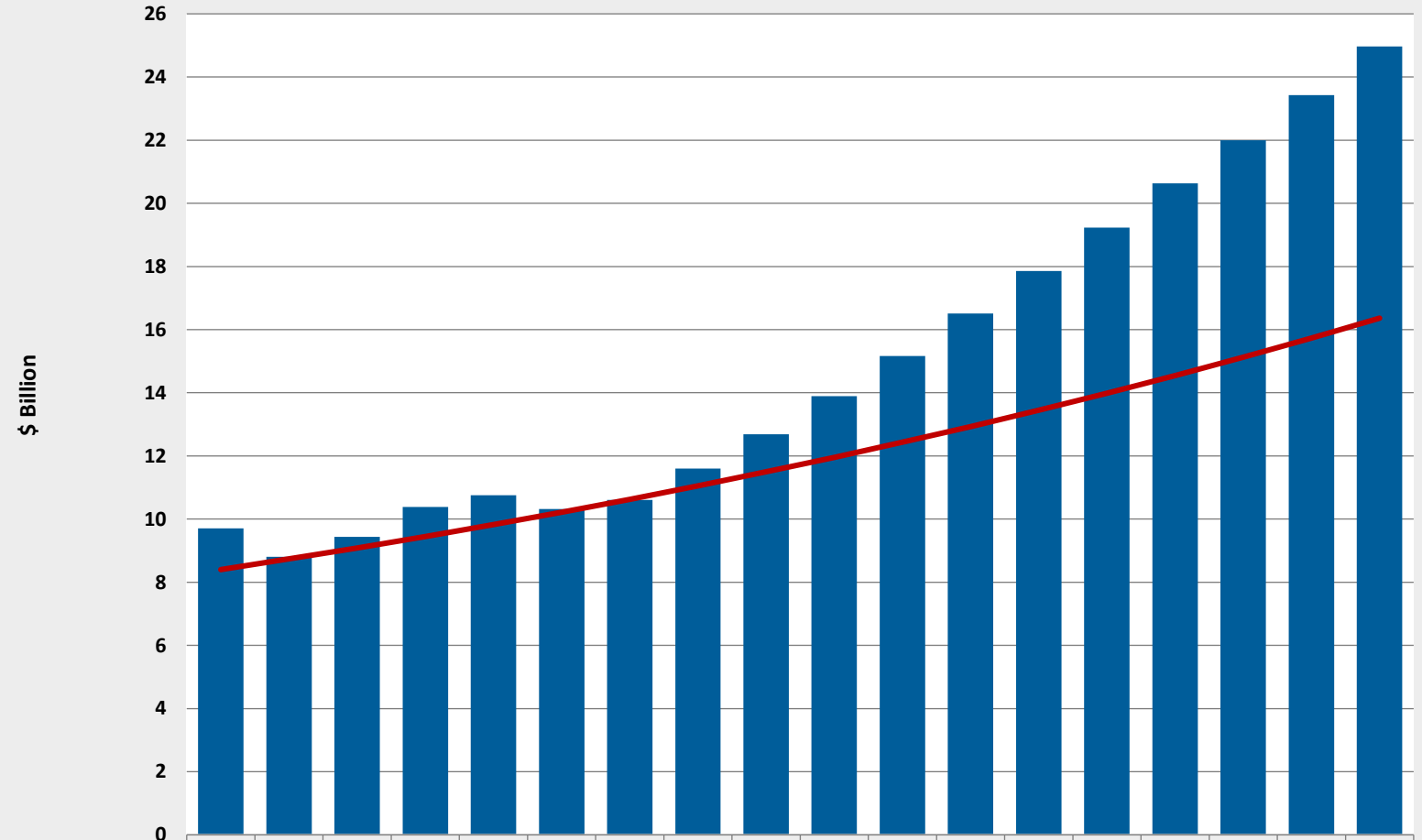
Drivers

- On the production side, the 'China + 1 strategy' of many international and western OEMs is driving strong investment in component and vehicle production in ASEAN
- Increasing focus on EV production & battery supply chain
- Relatively low tariffs encourage investment
- Vehicle sales growth being driven by strong economic growth in many of the ASEAN nations
- Demand and localised production also being strongly driven by entrance of lower cost Chinese EVs

Constraints

- Cross-border logistics and regulatory complexity
- Island geography make logistics more challenging
- Infrastructure requires some upgrades. For example, the region has very little rail, and is mostly road and short sea shipping containers for inbound and RoRo vessel for FVL
- Economic growth is slower in some ASEAN nations
- The Philippines and Singapore are starting from relatively low levels of production

Figure 3.1 ASEAN automotive logistics market forecast 2026-2036 ($bn)



	2019	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	2031	2032	2033	2034	2035	2036
ASEAN	9.71	8.80	9.43	10.38	10.75	10.32	10.61	11.60	12.69	13.89	15.17	16.51	17.85	19.23	20.63	22.00	23.43	24.96
Zero Growth	8.40	8.74	9.09	9.45	9.83	10.22	10.63	11.05	11.50	11.96	12.43	12.93	13.45	13.99	14.55	15.13	15.73	16.36

Source: Automotive Logistics

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4. ASEAN automotive logistics forecasts by country 2026-2036

ASEAN automotive logistics forecasts by country

Table 4.1 ASEAN production & sales by country 2024

	AL market	Production	Sales
Thailand	$3.40bn	1.47 million	633,000
Indonesia	$2.91bn	1.2 million	865,700
Malaysia	$2.33bn	790,300	816,700
Vietnam	$0.85bn	316,000	450,100
The Philippines	$0.62bn	117,400	468,900
Singapore	$0.12bn	~	51,706
Other ASEAN	$0.1bn	-	-
Total	$10.22bn	3.92 million	3.28 million

Source: Automotive Logistics / Marklines / OICA

4.1 ASEAN country analysis

High growth markets

Vietnam's automotive logistics market of $1.01bn in 2026 is expected to grow to $2.72bn by 2036 with a 10.4% CAGR.

Indonesia's automotive logistics market of $3.32bn in 2026 is predicted to reach $8.52bn by 2036 with a 9.9% CAGR.

The Philippines's automotive logistics market of $0.73bn in 2025 is due to grow to $1.63bn by 2036 with a 8.4% CAGR.

Modest growth markets

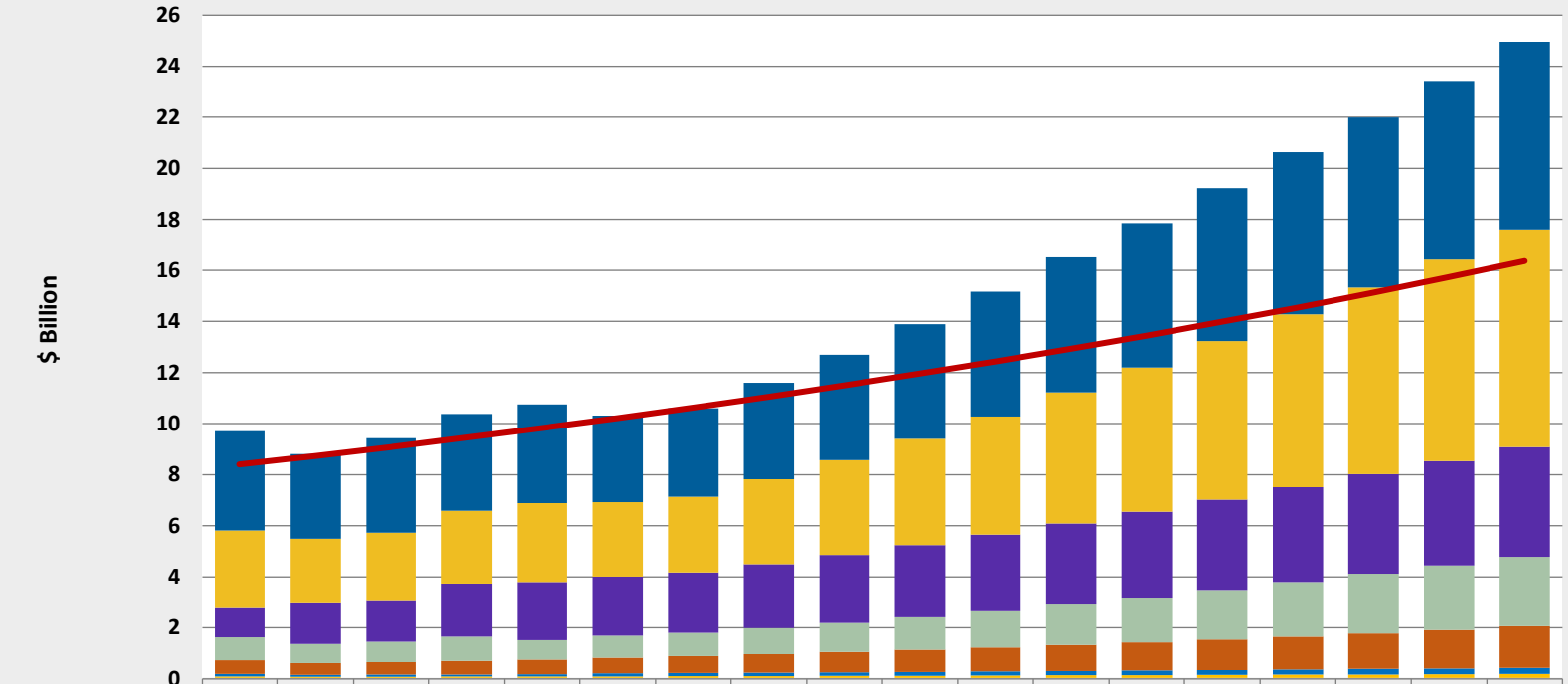
Thailand's automotive logistics market of $3.78bn in 2026 is forecast to reach $7.36bn by 2036 with a 6.9% CAGR.

Malaysia's automotive logistics market of $2.52bn in 2026 is expected to grow to $4.30bn by 2036 with a 5.5% CAGR.

Modest growth but a much smaller market

Singapore's automotive logistics market is valued at $0.13bn in 2026 and due to reach $0.24bn by 2036 with a 6.0% CAGR.

Figure 4.1 ASEAN automotive logistics market forecast by country 2026-2036 ($bn)



	2019	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	2031	2032	2033	2034	2035	2036
Thailand	3.90	3.32	3.71	3.79	3.86	3.40	3.47	3.78	4.12	4.49	4.89	5.29	5.66	6.00	6.35	6.67	7.01	7.36
Indonesia	3.04	2.52	2.67	2.86	3.09	2.91	2.96	3.32	3.72	4.16	4.62	5.13	5.64	6.21	6.77	7.31	7.89	8.52
Malaysia	1.14	1.60	1.60	2.07	2.28	2.33	2.37	2.52	2.67	2.83	3.00	3.18	3.37	3.54	3.71	3.90	4.09	4.30
Vietnam	0.90	0.76	0.79	0.95	0.76	0.85	0.90	1.01	1.13	1.27	1.42	1.58	1.75	1.95	2.14	2.33	2.52	2.72
Philippines	0.54	0.45	0.49	0.53	0.57	0.62	0.67	0.73	0.79	0.86	0.94	1.03	1.11	1.20	1.29	1.40	1.51	1.63
Singapore	0.09	0.08	0.08	0.08	0.09	0.12	0.13	0.13	0.14	0.15	0.16	0.17	0.18	0.19	0.20	0.21	0.23	0.24
Other	0.10	0.08	0.09	0.09	0.09	0.10	0.10	0.11	0.12	0.12	0.13	0.14	0.15	0.16	0.16	0.17	0.18	0.20
Zero Growth	8.40	8.74	9.09	9.45	9.83	10.22	10.63	11.05	11.50	11.96	12.43	12.93	13.45	13.99	14.55	15.13	15.73	16.36

Source: Automotive Logistics

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ASEAN analysis by country

4.2 Thailand

Thailand's automotive industry, in the past known as the "Detroit of Asia," is ASEAN's largest vehicle producer and exporter, and ranks 10th globally. Production was 1.47 million units in 2024, down 20% from 1.83 million in 2023. Some 1 million units are exported to Australia, MEA, and ASEAN.

Vehicle sales were 633,000 units in 2024, a decline, from 2023 and the lowest in 15 years. The drop was largely due to stricter auto loan approvals, high household debt, and a surge in non-performing loans (NPLs).

Although the country has attracted investments from Chinese EV manufacturers such as BYD, Great Wall, ChangAn, GAC, & Chery and bolstered by EV subsidy programs, EV growth has yet to compensate for the drop in local production.

Thailand's automotive ecosystem is supported by strategic government incentives and infrastructure, particularly in the Eastern Economic Corridor (EEC). The industry is transitioning toward electric vehicles (EVs), with the government's "30@30" policy aiming for 30% of total vehicle production to be EVs by 2030, which at current volumes equates to 725,000 cars and 675,000 motorcycles. Through the EV3.0 and EV3.5 programs, the government offers subsidies, tax cuts, and local production requirements to boost EV adoption.

The country is supporting electric vehicle (EV) production and battery logistics - and aiming to become a regional automotive hub, especially in electric vehicle (EV) production - key areas of growth in ASEAN markets like Thailand, Indonesia, and Vietnam.

Thailand hosts 49 OEM assembly plants and 10 headquarters, with Rayong and Samut Prakan being key hubs due to proximity to ports. Vehicle production is supported by around 800 Tier-1 suppliers and more than 2,000 other tier suppliers in a comprehensive automotive supply chain.

4.2.1 Thailand Major OEM Assembly Plants:

- **Toyota Motor Thailand** – Multiple plants, including in Samut Prakan and Chachoengsao
- **Honda Automobile (Thailand**) – Located in Ayutthaya.
- **Mitsubishi Motors Thailand** – Laem Chabang, Chonburi.
- **Isuzu Motors Thailand** – Samut Prakan.
- **Mercedes-Benz** (Thonburi Automotive Assembly Plant) – Bangkok
- **Ford and Mazda** – JV AutoAlliance Thailand in Rayong
- **Mazda** is growing its presence in Thailand by investing in a plant to supply the ASEAN region and export to Japan
- New entrants **BYD, Changan, Juneyao Auto, Great Wall**

4.2.2 Thailand Major Tier 1 Suppliers:

- **Thai Summit Group** – Body chassis & interior components
- **AAPICO Hitech** – Chassis and structural components
- **Valeo Automotive (Thailand**) – thermal systems, visibility systems, and powertrain solutions.
- **Ingress Industrial (Thailand)** – Door modules, sealing systems, and heat protectors
- **Denso (Thailand)** –Thermal systems, powertrain control modules, and electronics
- **Robert Bosch Automotive Technologies (Thailand) Co., Ltd**. Braking systems, electronics, and powertrain solutions
- **NHK Spring (Thailand) Co., Ltd**.- Supplies suspension systems and seat mechanisms to major OEMs
- **Musashi Auto Parts Co., Ltd.** - Gears and shafts
- **Aisin Takaoka Asia Co., Ltd.** - Specialises in casting products for engine and chassis components
- **ZF (Thailand) Ltd.** - Supplies transmission systems, chassis components, and safety technologies
- **Adient Summit Co., Ltd.** - JV producing seating systems
- **Thai Radiator Manufacturing Co., Ltd.-** Cooling systems **Antolin** – New plant to supply the wider ASEAN region
- GWM - joins forces with 5 auto parts manufacturers and distributors **SVOLT, HYCET, NOBO, MIND & Exquisite**
- **Forvia** – seat assembly plant

4.3 Indonesia

Indonesia's automotive industry is the second largest in the ASEAN region, trailing only Thailand. In 2024, the market showed strong domestic demand, supported by government incentives and a growing export base.

The country produced just over 1.2 million vehicles in 2024, a reduction from 1.4 million in 2023, with passenger cars and light commercial vehicles dominating output. Total vehicle sales were 865,700 units in 2024, down 14% from 2023.

However, from 2025, a new regional surcharge (an additional tax locally known as 'opsen' was introduced on vehicles, increasing the overall cost of vehicle purchase and use. This policy is likely to dampen demand.

In terms of production, Indonesia's strategic location, low labour costs, and expanding middle class make it an attractive hub for automotive manufacturing and investment.

Domestic EV adoption is still nascent but growing, with infrastructure and policy support accelerating the transition The government's "Making Indonesia 4.0" roadmap emphasises automotive as a key sector, with a focus on electric vehicles (EVs), digitalisation, and Industry 4.0 technologies.

Indonesia's has the world's largest deposits of nickel and is leveraging this in battery materials supporting electric vehicle (EV) and battery logistics - key areas of growth in ASEAN markets like Thailand, Indonesia, and Vietnam. The Indonesian government has set a goal of becoming the 3rd largest producer of electric batteries in the world by 2027 and to be producing 600,000 EVs by 2030.

OEMs are primarily concentrated in the Bekasi-Karawang corridor, which hosts five major manufacturers with a combined annual capacity of over 1 million vehicles.

ASEAN analysis by country

4.3.1 Indonesia Major OEM Assembly Plants:

- **PT Toyota Motor Manufacturing Indonesia (TMMIN)**– Karawang, West Java, Produces engines and components for Toyota vehicles, with local supplier integration
- **Daihatsu (Astra Daihatsu Motor)** – Sunter & Karawang - which is Daihatsu's largest overseas facility with 360,000 unit capacity
- **PT Mitsubishi Motors Krama Yudha Indonesia** – Bekasi, Vehicles and components, with local Tier 1 suppliers
- **Suzuki Indomobil Motor** – Cikarang and Tambun
- **Honda Prospect Motor** – Karawang, with Honda vehicles
- **Hyundai Motor Manufacturing Indonesia** – Cikarang,EVs

Indonesia has around **550 Tier 1 suppliers**, most of which serve the domestic market, though exports are increasing.

4.3.2 Indonesia Major Tier 1 Suppliers:

- **CATL: Karawang: A** JV of CBL International Development, PT Aneka Tambang (Antam), and the Indonesia Battery Corporation (IBC). Set to start production in 2026
- **HLI Green Power:** JV of Hyundai / LG Energy Solution
- **PT Astra Otoparts Tbk** - Indonesia's largest automotive component group, supplying engines, suspension, and electrical systems to both OEM and aftermarket sectors
- **PT ADVICS Indonesia** – Karawang; supplies engines, suspension, and electrical systems to over 40 countries
- **PT Gajah Tunggal** – Tangerang; One of Southeast Asia's largest tire manufacturers, supplying OEMs & aftermarket
- **Aisin Indonesia** – Karawang; transmissions / regulators
- **Nipress Tbk** – Bekasi, automotive batteries
- **PT Multistrada Arah Sarana (Michelin Group)** – Jakarta and West Java; high-performance tires
- **PT Braja Mukti Cakra (BMC)** – Precision components for OEMs like Mitsubishi, Hino, Isuzu, and Yanmar
- **PT Roda Prima Lancar -** Manufactures precision metal products and components for ASEAN automotive markets
- **PT Asian Isuzu Casting Center (AICC)** – Produces high-quality metal castings for Isuzu & other automotive clients

4.4 Malaysia

Malaysia's automotive industry is a vital part of its manufacturing sector, contributing approximately RM40 billion (approx. US$10 billion, 4% of GDP) and employing nearly 700,000 people.

Total production was 790,300 units in 2024, a 2% increase over 2023. Vehicle sales totalled 816,700 in 2024, with vehicle sales rising 2% from 799,821 units in 2023, despite regional headwinds.

Malaysia's automotive ecosystem is evolving toward electrification and smart manufacturing, positioning itself as a competitive regional hub. The government continues to support the sector through the National Automotive Policy (NAP), which promotes electric vehicle (EV) adoption, R&D, and sustainable manufacturing. By 2030, Malaysia aims for EVs to account for 20% of the total volumes and 80% by 2050, in line with the Low Carbon Mobility Blueprint (LCMB) and the National Energy Transition Roadmap (NETR). However, In 2024 EV share is only 2.6% of new car sales currently, so these ambitions seem optimistic.

The Malaysian automotive logistics market is poised for significant growth, driven by increasing vehicle production and domestic demand. The rise of electric vehicles (EVs) is also creating new logistics demands for battery and charging infrastructure. Challenges include managing the skills shortage, fluctuating fuel costs, and enhancing digital integration and infrastructure.

Malaysia hosts 28 vehicle assembly plants, producing passenger cars, commercial vehicles, and motorcycles.

4.4.1 Malaysia Major OEM Assembly Plants

- **Proton** – Shah Alam and Tanjong Malim (Proton City), producing models like the X50 and X70, and now also EVs
- **Perodua** – Sungai Choh, Rawang, with two plants capable of producing up to 320,000 vehicles annually
- **Toyota (UMW)** – Shah Alam and Bukit Raja, assembling Vios, Yaris, and Corolla Cross
- **Honda** – Pegoh, Melaka, capacity of 100,000 units/year
- **Volvo** – Shah Alam, Assembling Volvo models since 1967
- **Inokom (Sime Darby**) – Kedah, Porsche, BMW, Hyundai
- **Chery** – New plant for JAECOO and OMODA models
- **Mercedes Malaysia** – Pekan, Pehang
- **Volkswagen** – Pekan with by DRB-Hicom for VW & Audi brands. Another plant produces Porsche & MAN Trucks
- **EP Manufacturing Berhad (EPMB),** Melaka

Malaysia has over 200 Tier 1 suppliers –

4.4.2 Malaysia Major Tier 1 Suppliers

- **DRB-HICOM** – Owns HICOM Automotive and PHN Industries, supplies parts for Proton, Mercedes-Benz & VW
- **Automotive Corporation (Malaysia) Sdn. Bhd. (ACM)** and **Hicom-Teck See Manufacturing Malaysia Sdn Bhd Delloyd Group** – Doors, mirrors, electrical components
- **Ingress Corporation** – Door modules & sealing systems
- **Malaysian Automotive Lighting Sdn Bhd** – A subsidiary of Marelli, focusing on innovative lighting technologies
- **APM Automotive Holdings Berhad** – Suspension systems, seating systems, and electrical components
- **Sapura Industrial Berhad** – Precision machined components, modules & systems for powertrain & chassis
- **New Hoong Fatt Holdings Berhad** – Specialises in metal stamping and plastic injection parts components
- **KYB-UMW Malaysia Sdn Bhd** – JV between KYB and UMW, producing shock absorbers and suspension systems
- **Denso Malaysia Sdn Bhd**
- **EP Manufacturing Berhad (EPMB)** – 5 locations

ASEAN analysis by country

4.5 Vietnam

Vietnam's automotive industry is one of Southeast Asia's fastest-growing markets, driven by rising incomes, urbanisation, and government support.

However, overall vehicle production declined slightly to 316,000 units in 2024. The relatively small production volumes making Vietnam a net importer of vehicles.

There were 450,100 vehicles sold in 2024,an increase from 2023, reflecting strong domestic demand despite high import taxes and limited export competitiveness.

The market is dominated by foreign brands using completely knocked down (CKD) kits, although local production is expected to increase with greater investment.

Vietnam's supplier industry is largely foreign-owned, with localisation rates below 15%, but government incentives aim to boost domestic capabilities.

Vietnam is also supporting electric vehicle (EV) and battery logistics - key areas of growth in ASEAN markets like Thailand, Indonesia, and Vietnam. In fact, Vietnam's annual combined electric two-wheeler (E2W) and electric car sales have been forecast to increase from less than 1.0 million in 2024 to over 2.5 million by 2036.

Vietnam is targeting a 30% EV fleet by 2030, and also reducing registration fees and import taxes. However, a lack of EV charging infrastructure is holding back that ambition.

Vietnam hosts a mix of domestic and international OEMs including many legacy and new brands.

4.5.1 Vietnam Major OEM Assembly Plants

- **VinFast** – Vietnam's flagship automaker. EV plant in Hai **Phong**, produces EVs & scooters for Vietnam and export
- **VinFast** began construction of a 2nd EV factory in Hà Tĩnh **Province**, capacity of **300,000 vehicles/year** in Phase 1
- **Thaco (Truong Hai Auto Corporation)** – Assembles **Kia, Mazda, and Peugeot** vehicles in Quang Nam province
- **Toyota Vietnam** – Located in Vinh Phuc, CKD assembly of popular models like the Vios and Fortuner
- **Ford Vietnam - Hai Duong**. JV with Song Cong Diesel
- **Hyundai Thanh Cong Manufacturing Vietnam** (HTMV), **Ninh Binh**, exporting models like the Palisade to Thailand
- **Kia** – EV models including the EV3, and EV4
- **Honda Vietnam** – Vinh Phuc,Motorcycle & car assembly
- **Skoda** – New plant in **Quang Ninh,** producing the Kushaq
- **Chery (Omoda & Jaecoo)** – Set for production in Vietnam
- **Mercedes-Benz, BMW, Suzuki, Wuling** – Small facilities
- **TASCO/Geely Motors JV** – From 2025 for CKD assembly

4.5.2 Vietnam Major Tier 1 Suppliers

- Vietnam's suppliers are growing but limited in localisation:
- **Denso Vietnam** – Supplies components to Toyota, Honda, Mitsubishi, and Suzuki
- **Thaco Auto Parts** – Produces parts for its own vehicle lines and partners
- **Hyundai Thanh Cong Parts** – Supports Hyundai's plants
- **Samco (Saigon Transportation Mechanical Corporation)** – Bus and commercial vehicle components
- **TMT Motors** – Supplies trucks, buses, automotive parts
- **VinFast** – OEM produces automotive components and a battery JV with **Gotion** in the Vung Ang Economic Zone
- **Vietnam Auto Parts Co., Ltd.** – Supplies automotive components including tires, glass, and plastic parts
- **Zeder Vietnam** – Products: Polyurethane bushings, suspension parts for aftermarket and specialty segments
- **G7Auto** - Batteries, tires, lubricants, and spare parts
- **Truong Hai Spare Parts** – aftermarket components

4.6 Philippines

The Philippines' automotive market reached 468,900 units sold in 2024 a 7.6% growth over 2023's 441,393 units, marking a strong recovery and setting the stage for continued growth. The Philippines continues to have one of the lowest vehicle production outputs in Southeast Asia with only 117,400 units produced in 2024, a slight increase from 2023.

However, most vehicles are assembled from imported kits, with limited local manufacturing. Key assembly plants include Toyota (Santa Rosa), Mitsubishi (Laguna), and Isuzu, focusing on light commercial vehicles and trucks.

Despite structural challenges, the government is pushing for increased localisation and EV adoption through incentives and infrastructure development. The Philippines aims to adopt 6.6 million EVs, including 3.6 million electric motorcycles and 300,000 electric cars, by 2030 with a goal for 50% of all vehicles to be electric by 2040. The Electric Vehicle Industry Development Act (EVIDA) includes fiscal incentives for manufacturing, importing, and using EVs, as well as non- fiscal benefits e.g. streamlining customs & registration processes.

One of the key challenges is traffic congestion in cities, which increases delivery times and operating costs for logistics companies. Another challenge is that there is a fragmented logistics network, where multiple transportation modes and intermediaries complicate supply chain management. However, infrastructure development projects, such as roads and ports, are improving logistics capabilities, making it easier to transport vehicles & automotive components. Despite structural challenges, the Philippines is investing in EV infrastructure and local parts manufacturing to strengthen its automotive ecosystem.

Vehicle production in the Philippines is primarily focused on assembly using imported parts, with limited full manufacturing due to high costs.

ASEAN analysis by country

4.6.1 Philippines Major OEM Assembly Plants

- **Toyota Motor Philippines** – Santa Rosa, Laguna, producing **Innova**, **Vios**, **Tamaraw** light commercial vehicle
- **Mitsubishi Motors Philippines** – Assembles the **Mirage G4** and **L300** in Laguna
- **Isuzu Philippines** – Commercial vehicles and trucks
- **Honda Cars Philippines** – Previously operated a plant in Laguna, now focused on imports.
- **Foton and Hyundai** – Assemble light trucks and commercial vehicles locally
- **Hino Motors** – Specialises in truck and bus assembly
- **Vinfast** – CKD plant to open soon
- **GAIC** – will take over the former Geely operation

4.6.2 Philippines Major Tier 1 Suppliers

- **Roberts AIPMC (Automotive and Industrial Parts Manufacturing Corp.)** – Radiators, mufflers, leaf springs
- **LAMCOR** – **(Laguna Auto-Parts Manufacturing Corporation)** – A Mitsubishi Electric subsidiary producing electrical components
- **Denso Philippines** – Offers Thermal, powertrain, mobility, electrification, and electronic systems
- **Bosch Philippines** – Supplies diagnostics and spare parts
- **Autophil Zone** – Provides aftermarket and OEM parts
- **Yazaki-Torres Manufacturing, Inc.** – Wiring harnesses and electrical components
- **Philippine Auto Components, Inc. (PAC)** – Electrical and electronic automotive components
- **Fujitsu Ten Corporation of the Philippines** – Car navigation systems, multimedia devices
- **Asian Transmission Corporation (ATC)**: Manual transmissions and automotive gears
- **Nitto Denko Philippines Corporation** – Automotive tapes, insulation, and sealing materials
- **United Bearing Industrial Corporation (UBIC)** – Bearings
- **StB Giga Factory Inc**. – New EV battery plant

4.7 Singapore

Singapore's automotive market is unique within ASEAN, with negligible production volumes and low sales volumes due to high vehicle prices, strict ownership regulations.

The government's "car lite" vision sets a target for a zero vehicle growth rate. For example, Singapore requires a Certificate of Entitlement (COE) for a 10-year right to own and drive a vehicle in the city-state, costing US$100,000 upwards, with Additional Registration Fees (ARF) for premium and luxury vehicles as high as 320%. This strict policy system is designed to manage Singapore's limited road space and limit car ownership and explains very low sales figure in Singapore.

However, Singapore's automotive sales have increased, albeit from a very low base, with total vehicle registrations surging 37% to 51,706 units in 2024, up from 37,806 units in 2023. This growth was largely driven by the government's EV Early Adoption Incentive, which offered up to US$11,500 off the Additional Registration Fee (ARF) for EVs.

Singapore's vehicle production in 2024 was primarily driven by Hyundai, which began assembling Ioniq 5 and 6 models in its new facility, aiming for a capacity of 30,000 vehicles annually.

The government's push for electrification and smart mobility is reshaping the landscape, supported by incentives and infrastructure development. For example, the Singapore Green Plan 2030, sets a target of 60,000 EV charging points by 2030. The Land Transport Authority (LTA) also aims to electrify half of Singapore's bus fleet by 2030 and 100% EV fleet by 2040.

Singapore does not host large-scale vehicle assembly plants in part due to land constraints and high labour costs. Instead, it serves as a regional hub for automotive R&D, high end, specialised vehicles, distribution, & component manufacturing. Singapore is also known to have a significant volume of transhipments through its ports.

4.7.1 Singapore Major OEM Assembly and Operations

- **Hyundai** – Ioniq 5 and Ioniq 6 assembly in low volumes
- **Hyundai, Isuzu, Kia, Proton** – Maintain sales and service operations
- **Changan Automotive Singapore** – Regional operations and distribution
- **Toyota Motor Company Singapore** – Regional HQ and distribution

While full vehicle assembly is limited, Singapore plays a more strategic role in automotive innovation, software engineering, and component exports. Singapore's automotive ecosystem is geared toward high-tech, sustainable mobility, with growing investment in EV infrastructure, AI integration, and smart transport solutions.

4.7.2 Singapore Major Tier 1 Suppliers

Singapore is home to several Tier 1 suppliers and component manufacturers, many of which support ASEAN regional OEMs:

- **Denso Singapore** – Thermal and powertrain systems
- **Continental Automotive Singapore** – Focuses on electronics and safety systems
- **Bosch Singapore** – Provides diagnostics, sensors, and mobility solutions
- **Mitsubishi Electric Asia** – EV motors and control systems
- **Valeo Asia-Pacific** – Lighting and thermal systems
- **Hella Singapore** – Offers advanced lighting and electronics
- **ASEAN Automotive Limited** – Manufactures automatic transmission systems for passenger & commercial vehicles

4.8 Other ASEAN countries

Outside of the ASEAN-6, there is some vehicle production though it is very small-scale and primarily Completely Knocked Down (CKD) units. On the demand side, the vehicle markets are also relatively limited with Cambodia (35,465 sales), Laos (22,886), and Myanmar (4,203).

5. Leading ASEAN automotive logistics companies

Leading Companies

Table 5.1 Leading ASEAN automotive logistics companies logistics services 2025

Company	Inbound	Warehousing	Finished Vehicles	Aftermarket
APL Logistics	■		■	■
C.H. Robinson	■			■
CJ Logistics	■	■		
CMA CGM / CEVA Logistics	■	■	■	
COSCO / Cogent	■	■		
Dachser	■			
DB Group / DB Schenker (now part of DSV)	■	■	■	■
DHL Group	■	■	■	
DP World	■	■	■	■
DSV	■	■	■	
Gemadept	■	■	■	
SNCF / Geodis	■	■		
Hellmann Worldwide Logistics	■		■	■
Hitachi Transport Systems (HTS)	■			■
Hyundai Group / HMM Co. Ltd.	■		■	
JAS Worldwide	■			
Kintetsu World Express (KWE)	■	■	■	■
Kerry Logistics Network (KLN)	■			■
Kuehne + Nagel	■	■	■	
Maersk	■		■	
MSC	■	■	■	
Nippon Express	■	■		
Nippon Yusen (NYK Group) / Yusen Logistics	■	■	■	■
Phee Group	■	■	■	
Rhenus Group	■	■	■	
SCGJWD	■	■	■	■
Sinotrans / Sunsuria Bhd	■		■	
Tiong Nam Logistics	■	■		■
Toyota Tsusho Thai Holdings Co. Ltd. (TTTH)	■	■		
United Parcel Service (UPS)	■	■		■
Wallenius Wilhelmsen			■	
YCH Group	■			

Source: Automotive Logistics

Automotive LOGISTICS

Leading Companies

5.1 APL Logistics

APL Logistics plays a significant role in the ASEAN automotive logistics market, leveraging its global expertise to support major vehicle manufacturers and suppliers across the region. The company specialises in managing complex supply chains, offering end-to-end solutions that include inbound parts logistics, cross-border transportation, and outbound vehicle distribution. Its strong relationships with Original Equipment Manufacturers (OEMs) and tier suppliers enable it to deliver high-efficiency logistics services tailored to the fast-paced demands of automotive production.

In ASEAN, APL Logistics supports the movement of automotive components across international borders, ensuring just-in-time delivery to assembly plants. Its proprietary solutions like AutoDirect℠ and AutoLinx℠ optimise container space and streamline finished vehicle exports, enhancing cost-efficiency and operational control. These services are particularly valuable in manufacturing hubs like Thailand, Indonesia, and Vietnam which are central to global automotive supply chains.

By integrating advanced logistics technologies and offering scalable, multimodal transport options, APL Logistics helps automotive clients in ASEAN reduce lead times, manage inventory more effectively, and respond swiftly to market changes. Its commitment to innovation and operational excellence positions it as a trusted logistics partner in ASEAN's rapidly evolving automotive landscape.

Kintetsu World Express (KWE)'s operations in ASEAN are bolstered by its partnership with APL Logistics, enabling it to manage Complete Built-up Units (CBUs), capital equipment transportation, and after-sales logistics.

5.2 C.H. Robinson

C.H. Robinson is actively shaping the ASEAN automotive logistics market by offering strategic supply chain solutions tailored to the region's evolving dynamics. As Southeast Asia emerges as a key manufacturing hub under the "China+1" strategy, C.H. Robinson supports automotive OEMs and suppliers in navigating rising labour costs, shifting production bases, and geopolitical uncertainties.

The company's expertise lies in optimising complex supply chains through six core strategies: diversifying sourcing across multiple ASEAN countries, leveraging regional strengths (e.g., Thailand's EV production, Indonesia's battery materials), monitoring regulatory changes, investing in digital technologies, capitalising on aftermarket growth, and partnering with experienced third-party logistics providers.

C.H. Robinson's expansion in Southeast Asia, including new offices and regional partnerships, enhances its ability to deliver localised, agile logistics services. Their focus on electric vehicle (EV) logistics is particularly relevant, as ASEAN nations ramp up EV production and infrastructure development. By integrating automation, AI, and IoT into logistics operations, C.H. Robinson helps clients reduce costs and improve visibility across the supply chain.

Overall, C.H. Robinson plays a leading role in enabling automotive companies to adapt to ASEAN's fast-changing landscape, ensuring supply chain resilience and long-term growth.

5.3 CJ Logistics

CJ Logistics plays a significant role in the ASEAN automotive logistics market, with operations in Thailand, Malaysia, Vietnam, Indonesia, and Singapore, introducing Korean logistics technologies under its "K-Logistics" initiative. CJ Logistics has significantly expanded its footprint in the ASEAN automotive market through a strategic blend of infrastructure investment, technology transfer, and regional partnerships. Their involvement in Automotive logistics includes automotive parts distribution, EV logistics, and cross-border freight.

In Thailand, CJ Logistics established a 71,900 m2 central distribution centre in Bangkok, Thailand equipped with high-speed wheel sorters capable of processing 400,000 parcels daily. This facility supports both e-commerce and automotive logistics by enabling rapid, high-volume distribution.

In Malaysia and Vietnam, CJ Logistics has deployed its proprietary TES (Technology, Engineering, System & Solution) framework, including the Multi-Purpose System (MPS) and Digital Assorting System (DAS) to automate warehousing, picking, and inventory management, boosting efficiency and reducing labour dependency - critical for automotive parts logistics where precision and speed are essential.

Additionally, CJ Logistics has formed JVs acquiring majority stakes in local companies like Gemadept Logistics Holding and Gemadept Shipping Holding in Vietnam and CJ Century in Malaysia. These moves align with its "Pan Asia No.1 Strategy," aiming to become a leading logistics provider across ASEAN. CJ Century has also expanded its logistics capabilities by acquiring CJ Korea Express Malaysia Sdn Bhd, further consolidating its position in the Malaysian logistics market. The company also collaborates with Scania, operating a fleet of 84 Scania Prime Movers, for automotive logistics.

Leading Companies

5.4 CMA CGM / CEVA Logistics

CMA CGM, a global leader in shipping and logistics, has been steadily expanding its influence in the ASEAN automotive logistics market through its integrated logistics arm, CEVA Logistics, and strategic regional operations. While traditionally known for its maritime shipping services, CMA CGM has increasingly focused on end-to-end supply chain solutions, including automotive logistics to support the growing demand in Southeast Asia. CEVA Logistics directly supports automotive supply chains in key ASEAN markets such as Thailand, Vietnam, and Indonesia. CEVA Logistics specialises in cross-border automotive trade, supply chain integration, freight management, contract logistics, and distribution management, all crucial for automotive logistics.

Key Automotive Logistics Services in ASEAN

Inbound Logistics: Includes milk-run collections, drayage, full truckload (FTL) and less-than-truckload (LTL), reusable packaging management, and in-plant services

Battery Logistics: CEVA handles compliant transport and storage of lithium-ion batteries and battery management systems (BMS), which is critical for the region's growing EV sector

Outbound Logistics: Multimodal transport (road, rail, ocean), vehicle storage, preparation, customisation, and delivery. CEVA also supports car subscription and marketing logistics

Aftermarket Logistics: Includes warehousing, distribution, reverse logistics, and flow management with full traceability through EDI, API, and web-based control tower systems

5.5 COSCO / Cogent

COSCO shipping plays a growing role in the ASEAN automotive logistics market, primarily through its Singapore-based subsidiary, COSCO Shipping International (Singapore) Co., Ltd., and its logistics brand Cogent. With over 20 years of experience, Cogent is a leading automotive logistics provider in Singapore, offering a full suite of services including customs processing, bonded warehousing, vehicle transportation, and container stuffing/un-stuffing for import and export operations.

COSCO's automotive logistics operations are tailored to meet the needs of both new and used vehicle markets. It operates multiple licensed warehouses strategically located across Singapore, capable of storing over 3,000 vehicles. These facilities support duty-paid and de-registered vehicles awaiting export or scrapping. The company also provides 24/7 transport services, GPS fleet tracking, and document handling for customs and regulatory compliance.

COSCO Shipping emphasises operational excellence with a "Zero Damage Policy" and ISO 9001:2008 certification, ensuring high standards in vehicle handling. Its integration of shipping, port, and inland logistics services positions it as a key player in supporting ASEAN's growing automotive trade, particularly in Singapore's role as a regional logistics hub.

Key Areas of Involvement include the Digital Automotive Supply Chain Platform offering enhanced logistics efficiency, real-time tracking & visibility, and integrated logistics planning achieving seamless coordination across shipping, port, and inland logistics. COSCO Shipping has demonstrated its capabilities by significantly reducing logistics costs and improving supply chain control for China's Geely Auto, which exports vehicles to Southeast Asia.

5.6 Dachser

Dachser, a global logistics provider headquartered in Germany, has been steadily expanding its footprint in the ASEAN automotive logistics market as part of its broader Asia-Pacific growth strategy. Recognising the region's rapid economic development and strategic importance, Dachser has invested in infrastructure and digital solutions to support complex supply chains, particularly in the automotive sector.

In ASEAN, countries like Thailand and Vietnam have emerged as key logistics hubs. Dachser has leveraged these locations to offer integrated services, including procurement logistics, buyer's consolidation, and multimodal transport solutions tailored to the automotive industry. The company's Air & Sea Logistics Asia Pacific (APAC) unit plays a central role, with over 1,500 employees across 45 locations in 9 countries, ensuring proximity to customers and markets.

Dachser emphasises the use of transformative technologies such as AI and IoT to enhance supply chain visibility and efficiency. Its digital platforms provide real-time tracking, documentation management, and seamless integration with global networks. By aligning with regional initiatives like Thailand's "Ignite Thailand" vision and capitalising on trade agreements like RCEP, Dachser is positioning itself as a key logistics partner for automotive manufacturers and suppliers across ASEAN.

Dachser has expanded its footprint in Southeast Asia with new offices in Chiang Mai (Thailand) and Da Nang (Vietnam), supporting industries like automotive, electronics, and fashion It also operates near Bangkok's Suvarnabhumi Airport, a key logistics hub.

Leading Companies

5.7 DB Group / DB Schenker (now part of DSV)

DB Schenker was formerly the logistics division of the broader DB Group. In 2024 DSV acquired DB Schenker, and in early 2025, the division formerly became part of the DSV group.

DB Schenker plays a pivotal role in the ASEAN automotive logistics market, leveraging its extensive regional presence and global expertise to support OEMs, Tier suppliers, and aftermarket distributors across Southeast Asia. With over 136 locations and 8,500 employees across ASEAN, DB Schenker offers integrated, asset-light logistics solutions tailored to automotive supply chains.

Through its **Automobility+** program, DB Schenker provides end-to-end services including transportation, warehousing, battery logistics, and just-in-time delivery. Key services include:

Inbound logistics: JIT and JIS deliveries, supplier coordination, and cross-border transport.
Contract logistics: Warehousing, inventory management, and value-added services
Finished vehicle logistics: Transport, yard management, and pre-delivery inspection (PDI)
Aftermarket support: Distribution of service parts and reverse logistics.

The company also operates seven global Sea/Air hubs, including one in Singapore, which acts as a key transit point for automotive flows between Asia, Europe, and North America. DB Schenker's Asia LANDbridge product enhances cross-border trucking and rail services across ASEAN, connecting strategic hubs such as the Johor-Singapore Special Economic Zone in Singapore, and also hubs in Malaysia, Thailand, Vietnam, Cambodia, and Indonesia.

5.8 DHL Group

A global leader in logistics, DHL Group provides comprehensive services including warehousing, transportation, and supply chain management solutions specifically for the automotive sector. DHL plays a strategic and expanding role in the ASEAN automotive logistics market, particularly through its focus on electric vehicle (EV) logistics and supply chain resilience. As part of its Strategy 2030, DHL has launched Electric Vehicle Centres of Excellence (COEs) in Singapore, Indonesia, and others in Shanghai and globally. These centres support the entire EV value chain offering end-to-end logistics solutions for EV manufacturers, suppliers, and aftermarket services. The COEs offer:

Inbound-to-manufacturing (I2M) services for EV assembly plants, including door-to-door transport and storage of EV batteries and components.
Capital equipment and battery material logistics for gigafactories, supporting mining and processing of essential materials.
Finished EV logistics, including vehicle-in-container solutions and air freight for prototypes

DHL also emphasises road freight as a vital component of multimodal logistics in Southeast Asia. The region's land connectivity enables cost-effective, door-to-door transport solutions, which are crucial for automotive supply chains seeking flexibility and resilience amid global disruptions.

DHL's approach includes its ASEA omnisourcing strategies, helping companies diversify production & logistics away from China to Vietnam, Thailand, and Malaysia. DHL is also investing in digitalisation and automation across its warehouses, enhancing operational efficiency and safety. These efforts, combined with its cross-border road freight network & regional infrastructure, make DHL a significant player in supporting ASEAN automotive logistics growth.

5.9 DP World

DP World is actively expanding its footprint in the ASEAN automotive logistics market, capitalising on ASEAN's emergence as an offshore manufacturing base for Chinese companies. As Chinese firms seek to bypass Western trade barriers and reduce costs, DP World is positioning itself as a strategic logistics partner by investing in advanced port infrastructure and digital logistics solutions, forming local partnerships, and acquiring regional assets.

In the Philippines, DP World's Batangas terminal handles 80% of the country's finished vehicle imports, with dedicated RoRo berth, multi-level parking, PDI inspection points, powered by the CARGOES TOS+ system, offering real-time supply chain visibility. Key initiatives include acquisition of Savan Logistics in Laos which operates the Savannakhet Dry Port in the country's first special economic zone. In Malaysia, it partnered with Sabah Ports to manage the Sapangar Bay Container Port, and in Indonesia, it joined forces with the Indonesia Investment Authority and PT Pelabuhan Indonesia (Pelindo) to operate the Belawan New Container Terminal. In Vietnam, its Saigon Premier Container Terminal (SPCT) is the only RoRo-capable terminal in the south handling over 50% of the country's complete built-up (CBU) vehicle market. SPCT's adoption of advanced software and contract with Toyota Motor Vietnam underscore its importance.

5.9.1 Imperial Logistics

In 2022, DP World acquired Imperial Logistics. As ASEAN emerges as a key hub for automotive production, logistics providers like Imperial have been instrumental in orchestrating complex supply chains that span multiple countries, including Indonesia, Thailand, Vietnam, Malaysia, and the Philippines. Imperial Logistics offers integrated solutions such as inbound and outbound logistics, warehousing, transportation, and aftermarket support. Their services are tailored to meet the demands of both traditional and EV supply chains, which require specialised handling and distribution.

Leading Companies

5.10 DSV A/S

DSV is a major player in the ASEAN automotive logistics market, leveraging its global expertise, advanced technology, and regional infrastructure to support OEMs, Tier suppliers, and aftermarket distributors across Southeast Asia. DSV provides end-to-end automotive logistics solutions including:

Inbound to Manufacturing: Planning, transportation, and optimisation of parts and components to support just-in-time (JIT) and just-in-sequence (JIS) production models.

Warehousing & Value-Added Services: DSV offers vendor-managed inventory, kitting, sequencing, packaging, and line-side delivery services to streamline production

Finished Vehicle Logistics: Through its **Finished Vehicle Competency Center (VCC)**, DSV handles transportation of low-volume, high-value vehicles, including test, concept, and show vehicles.

Aftermarket Logistics: DSV supports import/export distribution centres and dealer services, ensuring efficient delivery of service parts and accessories

DSV has established the **Electrification & Mobility Competence Center (EMC²)**, focusing on sustainable logistics for EV platforms, lithium batteries, and hazardous automotive goods.

DB Schenker was formerly the logistics division of DB Group. In 2024 DSV acquired DB Schenker, and in early 2025, the division formerly became part of the DSV group.

5.11 Gemadept

Gemadept is involved in the ASEAN automotive logistics market, particularly through its operations in Vietnam, where it serves as a key logistics and port operator. CJ Logistics holds a majority stake in two of Gemadept's key subsidiaries: Gemadept Logistics Holding and Gemadept Shipping Holding.

Gemadept's services and partnerships position it as a strategic player in supporting ASEAN and offering a comprehensive suite of logistics services tailored to the automotive sector:

- **Automotive parts distribution**
- **Vehicle transport and handling**
- **Reefer logistics for temperature-sensitive components**
- **Out-of-gauge (OOG) cargo transport for oversized automotive equipment**

These services are part of Gemadept's broader Port - Logistics Ecosystem, which integrates shipping, warehousing, and inland transport to support efficient supply chains.

5.11.1 Gemadept joint ventures

Gemadept formed a JV with Japan's "K" Line in 2014, called KGL (K Line – Gemadept Logistics). KGL provides services to OEMs Isuzu, Mitsubishi, Mercedes, Subaru, and Toyota. This partnership has:

- **Enhanced Gemadept's capabilities in automotive logistics**
- **Facilitated vehicle import/export operations**
- **Supported OEMs and tier suppliers with integrated logistics solutions**
- **Contributed to Vietnam's role as a logistics hub for ASEAN automotive trade**
- **Enhanced Cross-border logistics connecting Vietnam with Thailand, Malaysia, and others**

5.12 SNCF / Geodis

A subsidiary of French rail operator SNCF, Geodis is a global logistics provider which has expanded its ASEAN automotive logistics presence through strategic infrastructure investments, multimodal transport solutions, and specialised services tailored to automotive and eMobility sectors.

5.12.1 Strategic Road Network Expansion

Geodis has developed a robust Road Network connecting key Southeast Asian countries—Singapore, Malaysia, Thailand, and Vietnam - with China, enabling Geodis to support the growing automotive trade between ASEAN and China, enhancing cross-border logistics capabilities. Geodis has equipped its logistics operations with advanced IoT technologies for real-time tracking to ensure secure and efficient transportation of high-value automotive components. The company has enhanced multimodal integration with major air and seaports to offer flexible and cost-efficient logistics options. The company has also strengthened customs brokerage and trade compliance teams.

5.12.2 Automotive-Specific Logistics Solutions

- **Just-in-time (JIT) and just-in-sequence (JIS) deliveries to support production line continuity.**
- **Inbound warehouse solutions for storing and assembling components.**
- **Sub-assembly and line feed operations that integrate with clients' IT systems.**
- **Battery logistics for electric vehicles, including safe transport and storage of lithium batteries.**
- **Packaging and container management, including cleaning, repair, and recycling.**
- **Aftermarket logistics to support dealer networks and service centres.**

Leading Companies

5.13 Hellmann Worldwide Logistics

Hellmann Worldwide Logistics is a key player in the ASEAN automotive logistics market, offering tailored supply chain solutions that support both traditional automotive operations and the growing electric vehicle (EV) sector. Hellmann provides-

Global procurement and distribution of production and spare parts
Buyers consolidation and contract logistics
Aftermarket logistics for spare parts and service components
E-mobility logistics, including battery transport and green supply chain solutions
Multimodal transport (air, sea, road, rail), including the Iron Silk Road from/to China
Real-time tracking, customs brokerage, and IT integration for supply chain visibility

Their approach emphasises stability and sustainability amid volatile market conditions. Hellmann develops 360° logistics concepts for e-mobility, identifying CO_2 reduction opportunities and shifting transport modes to rail where feasible. The company also facilitates cross-border movement of car parts and complete vehicles, including along the Iron Silk Road between China and ASEAN markets.

Hellmann's logistics infrastructure includes real-time shipment tracking, customs brokerage, IT integration, and specialised packaging solutions. Their expertise in EV logistics—such as compliant battery storage and handling—positions them as a strategic partner for OEMs expanding in ASEAN.

5.14 Hitachi Transport System (HTS)

Hitachi Transport System (HTS), a core logistics subsidiary of Hitachi Ltd., has been actively involved in the ASEAN automotive logistics market particularly through its operations in Thailand. Through a combination of digital innovation, infrastructure development, and strategic partnerships aimed at improving supply chain efficiency across Southeast Asia.

5.14.1 Vehicle Sharing Service in Thailand

One notable initiative is its vehicle sharing service in Thailand in collaboration with Hitachi Asia (Thailand), targeting logistics efficiency for automotive and manufacturing sectors. This service allows multiple shipping companies to share transport vehicles, reducing delivery costs and improving vehicle utilisation rates—from 15% to 30% during pilot phases —and contributing to reduced traffic congestion and delivery times.

Hitachi Transport System also supports Thailand's "Thailand 4.0" initiative, addressing traffic congestion, driver shortages, and rising logistics costs. The company's logistics services align with this vision by leveraging digital technologies such as IoT, AI, and big data to optimise fleet maintenance, route planning, and supply chain operations. These efforts are part of a broader strategy to modernise logistics infrastructure across ASEAN, addressing challenges like driver shortages, rising costs, and environmental concerns. Hitachi aims to expand its services to cover over 21,000 trucks by fiscal year 2023, targeting manufacturing, distribution, and shipping sectors.

5.14.2 Localised Repair Centres

HTS has also established in-market repair centres in Thailand and Indonesia to support automotive and industrial equipment logistics. This localisation is crucial for supporting the growing automotive aftermarket and service parts logistics in ASEAN.

5.15 Hyundai Glovis / HMM Co. Ltd.

Hyundai Glovis and HMM Co., Ltd. (formerly Hyundai Merchant Marine) are separate companies but they are linked through strategic partnerships and a shared historical connection to the broader Hyundai Group.

Hyundai Glovis is the logistics and shipping subsidiary of **Hyundai Motor Group**, specialising in automotive logistics, shipping (e.g.car carriers), and supply chain management.

HMM Co. Ltd is South Korea's largest container shipping company and formerly part of Hyundai Group. It is now independent and no longer owned by Hyundai Motor Group.

Despite being separate entities, the two companies collaborate strategically. In 2024, Hyundai Glovis partnered with HMM to reintroduce HMM into the automobile shipping sector. HMM ordered seven new car carrier vessels, which will be operated by Hyundai Glovis**.** These vessels, expected to be delivered starting in 2025, will be operated by Hyundai Glovis and are part of a broader strategy to expand its fleet from 87 to 110 ships by 2027

Over half of the new capacity is intended for vehicles from automakers beyond Hyundai and Kia, targeting automakers in the US, Europe, and ASEAN, signalling a push for market diversification.

HMM's renewed focus on automotive logistics aligns with the booming export of Chinese vehicles, especially electric models, and the tightening of maritime emission regulations that have led to the scrapping of older vessels. This strategic move positions HMM to play a key role in automotive logistics across ASEAN, leveraging its global shipping infrastructure and Hyundai Glovis' operational expertise.

Leading Companies

5.16 JAS Worldwide

JAS Worldwide plays a significant role in the ASEAN automotive logistics market through its dedicated Automotive Vertical, which caters to OEMs, Tier 1 and Tier 2 suppliers, and 3PL customers. The company specialises in -

- **Inbound material logistics**
- **Supply chain solutions**
- **Aftermarket components**
- **Value-added assemblies**
- **Digital container ordering systems** for enhanced efficiency

Operating in over 100 countries, JAS leverages its global network to support complex, multi-country automotive supply chains. Its expertise lies in managing just-in-time deliveries, coordinating international flows, and ensuring seamless product movement across borders. JAS has also been recognised for its digital innovation, notably receiving the ZF Supplier Award for implementing a standardised digital container ordering system, which enhances operational efficiency.

In the ASEAN region, where automotive logistics faces challenges such as fragmented supply bases and infrastructure gaps, JAS's capabilities in digitalisation and supply chain resilience position it as a strategic partner. The company's commitment to sustainability, including science-based climate targets and emissions reduction initiatives, further aligns with the evolving demands of the automotive industry in Southeast Asia.

5.17 Kintetsu World Express (KWE)

Kintetsu World Express (KWE) plays a pivotal role in the ASEAN automotive logistics market by offering end-to-end supply chain solutions tailored to the industry's complex demands. KWE supports OEMs and tiered suppliers through -

- **Inbound logistics for parts and components**
- **Warehousing and inventory management**
- **Transportation of Complete Built-up Units (CBUs)**
- **After-sales logistics and dealer distribution**
- **Emergency hand-carry and alternative modal transport solutions**
- **Cross-dock and merge-in-transit capabilities**
- **Milk run deliveries for mixed loads**

KWE's operations in ASEAN are bolstered by its partnership with APL Logistics, enabling it to manage Complete Built-up Units (CBUs), capital equipment transportation, and after-sales logistics. The company's infrastructure includes dedicated control towers, KPI analytics, and flexible transport modes, ensuring business continuity and operational efficiency. Its capabilities also extend to emergency hand-carry solutions and merge-in-transit services, which are crucial for maintaining production flow in dynamic markets.

In Thailand, one of its key ASEAN hubs, KWE has significantly scaled operations, with over 450 employees and 110,000m² of warehouse space. This reflects both the strategic importance of the Thai automotive sector and KWE's commitment to high-value-added logistics services.

5.18 Kerry Logistics Network (KLN)

Kerry Logistics Network (KLN), formerly known as Kerry Logistics, plays a pivotal role in the ASEAN automotive logistics market leveraging its extensive regional infrastructure, cross-border transport capabilities, and strategic investments to support automotive supply chains across Southeast Asia. The company supports automotive manufacturers with end-to-end logistics services, including sourcing and supply of raw materials, delivery of finished vehicles, and aftermarket logistics.

KLN has a strong footprint in Thailand, Vietnam, Singapore, Malaysia, Myanmar, and the Philippines, allowing it to support OEMs and Tier suppliers with localised and cross-border logistics. Its infrastructure and services are designed to capitalise on the shift of supply chains from China to ASEAN, driven by trade diversification and regional integration.

Automotive Logistics Services

Inbound logistics & Vendor-Managed Inventory (VMI): Ensures continuous raw material supply with JIT delivery, milk-run logistics, and vendor hub operations.
Production line support: Cross-docking, buyers' consolidation, and upstream logistics.
Sub-assembly & kitting: Final assembly near end customers to reduce depreciation risks.
After-sales logistics: Distribution to 4S stores, reverse logistics, spare parts management, and product recalls.
Value-added services: Vehicle cleaning, tyre checks, battery recharging, CKD/SKD operations, and event logistics

Leading Companies

5.19 Kuehne + Nagel

Kuehne + Nagel is a major player in the ASEAN automotive logistics market, leveraging its extensive global network and regional expertise to support automotive OEMs, tier suppliers, and battery producers. The company offers tailored logistics solutions for the automotive and new mobility sectors, including just-in-time production logistics, finished vehicle distribution, and battery supply chain management with certified safety systems. To strengthen its presence in ASEAN, Kuehne + Nagel consolidated its Asia Pacific operations under a single regional headquarters in Singapore. This strategic move, involving over 10,000 professionals, aims to accelerate growth across the region. The company views Asia Pacific as a key driver of global economic development and is investing heavily in expanding its capabilities in seafreight, airfreight, contract logistics, overland transport, just-in-time delivery and customised transportation.

5.19.1 Automotive Logistics Capabilities

Inbound logistics: JIT and JIS deliveries, supplier coordination, and cross-border transport
Contract logistics: Warehousing, inventory management, kitting, sequencing, line-side delivery
Finished vehicle logistics: Transport, yard management, and pre-delivery inspection (PDI)
Aftermarket logistics: Distribution of service parts, reverse logistics, and returns management

5.19.2 Focus on New Mobility and EV Logistics

Battery logistics: Safe transport and storage of lithium-ion batteries.
EV component handling: Specialised warehousing and distribution for EV parts.
Sustainability initiatives: Integration of green logistics practices and carbon tracking

5.20 Maersk

Maersk plays a pivotal role in shaping the ASEAN automotive logistics market by leveraging its global logistics infrastructure and digital capabilities to support the region's evolving automotive supply chains. As ASEAN emerges as a key automotive manufacturing and export hub, Maersk supports OEMs and suppliers with ocean, air, and inland transport services. Its logistics network spans major ASEAN corridors, including cross-border trucking routes like Thailand–Malaysia–Singapore and China–Vietnam, enabling seamless movement of automotive components and finished vehicles.

5.20.1 Maersk's Automotive Supply Chain Solutions

Battery logistics for electric vehicles (EVs)
Cars in containers for flexible vehicle transport
Customs and inland services for cross-border movement
Digital visibility tools for real-time tracking and disruption management.

A key contribution is that Maersk has engaged directly with the ASEAN Secretariat to support the ASEAN Customs Transit System (ACTS), which streamlines cross-border trade by allowing a single electronic customs declaration and temporarily suspending duties during transit. This system enhances efficiency, reduces delays, and benefits automotive supply chains that rely on JIT delivery.

Maersk also invests in digital tools like the Maersk Visibility Studio and Trade & Tariff Studio, offering real-time tracking, tariff modelling, and planning support. This helps automotive clients navigate complex trade environments and optimise logistics performance. By combining infrastructure, technology, and regulatory expertise, Maersk strengthens ASEAN's automotive logistics ecosystem, supporting the region's transition toward electric vehicles and sustainable supply chain practices.

5.21 MSC

MSC (Mediterranean Shipping Company) is actively expanding its footprint in the ASEAN automotive logistics market, primarily through its automotive shipping services and strategic support for Chinese automotive exports to Southeast Asia, leveraging its global expertise to support the region's evolving supply chain needs. MSC's automotive logistics capabilities include transporting finished vehicles, engines, batteries, and oversized components.

MSC's dedicated automotive logistics team offers tailored solutions for automotive OEMs and Tier 1 suppliers, integrating advanced warehousing, real-time tracking, and optimised routing. These services are crucial for navigating the complex logistics landscape of Southeast Asia, which includes challenges like cross-border trade, infrastructure gaps, and the transition to electric vehicles (EVs).

MSC emphasises digitalisation and containerised logistics as key strategies to enhance supply chain resilience and agility. By aligning with regional trends such as EV adoption and smart logistics networks, MSC positions itself as a strategic partner in ASEAN's journey toward a more integrated and future-ready automotive logistics ecosystem.

5.21.1 Automotive Shipping Network

MSC has developed a standalone East/West logistics network designed to support Chinese automotive manufacturers. This infrastructure enables the flow of EVs and other automotive products from China to ASEAN countries such as Vietnam, Thailand, Malaysia, and Indonesia.

Leading Companies

5.22 Nippon Express

Nippon Express has significantly expanded its footprint in the ASEAN automotive logistics market, positioning itself as a key player in supporting the region's growing automotive industry. Through its subsidiary NX South Asia & Oceania, the company's logistics network spans key ASEAN markets such as Thailand, Malaysia, Vietnam. The company offers comprehensive logistics solutions tailored to automotive manufacturers and suppliers, including EV and autonomous vehicle sectors. Nippon Express provides end-to-end services such as procurement logistics, cross-border transportation, and delivery period management, ensuring efficient and timely supply chain operations.

5.22.1 Integrated Automotive Logistics Services

Just-in-Time (JIT) logistics: Strategically positioned JIT warehouses across ASEAN enable synchronised deliveries aligned with factory production schedules
Procurement logistics: Solutions like milk-run collections and buyers' consolidation help streamline inbound supply chains
Parts Consolidation Centres: These centres optimise container loading and reduce transportation costs by consolidating components from multiple suppliers
Cross-border logistics: Nippon Express facilitates seamless movement of automotive parts across ASEAN countries using multimodal transport, including rail and RoRo shipping.

Recent investments, including new distribution centres in Vietnam and Thailand, further reinforce its dedication to serving the ASEAN automotive market.

5.23 Nippon Yusen (NYK Group) / Yusen Logistics

Nippon Yusen (NYK Group), through its logistics arm Yusen Logistics, is involved in the ASEAN automotive logistics market offering end-to-end supply chain solutions. With a strong presence in Thailand, Vietnam, and Indonesia, Yusen supports major OEMs and Tier 1 suppliers through a combination of strategic partnerships, advanced logistics infrastructure, and sustainability initiatives.

5.23.1 Automotive logistics solutions

Inbound procurement and production logistics: Milk-run collections, cross-docking, and just-in-time (JIT) warehousing help streamline the flow of parts to manufacturing plants
Production and assembly support: Yusen offers production line feeding, light assembly, and yard management to ensure efficient operations at OEM facilities
Finished vehicle logistics: This includes carrier transport for complete built units (CBUs), prototype vehicle handling, and pre-delivery inspection (PDI) services
Aftermarket distribution: Strategically located regional distribution centres (RDCs) support fast delivery of service parts across ASEAN

In Thailand, at its LLC3 warehouse in Chonburi, Yusen Logistics has developed sustainable logistics by deploying EV trucks and built solar-powered charging stations. These trucks are used for deliveries in the automotive and chemical sectors, supporting clients like Ajinomoto**.** Also in Thailand, Yusen Logistics has deepened its automotive logistics capabilities through a JV called Mazda Logistics and Yusen (Asia) Co., Ltd., delivering spare parts logistics services.

5.23.2 Tasco

Tasco Berhad operates primarily as Yusen Logistics' Malaysian arm where Tasco supports OEMs with automotive parts and finished vehicle movement across ASEAN. A key development is its Tasco JSC JV with Geely Auto Group for a CKD assembly plant in Thai Binh province, Vietnam.

5.24 Phee Group

Phee Group has emerged as a prominent logistics provider in the ASEAN automotive market, leveraging over three decades of experience across the Indo-China region. Headquartered in Myanmar, with operations in Singapore, Cambodia, Vietnam, and Laos, offering specialised automotive logistics services such as inland vehicle transport and contract logistics. Its Auto Logistics division is equipped with a fleet of 16 modern trailers, ensuring safe and timely in-land transportation of vehicles across Myanmar.

The company also provides –

Freight forwarding and logistics: Leveraging a network of over 100 strategic partner agents worldwide, Phee Group facilitates international and regional automotive logistics
Supply chain solutions: Through its subsidiary, Phee Central Limited, the group offers integrated logistics and contract warehousing services. Its scalable 100,000 sq. ft warehouse in Myanmar supports inventory management and distribution for automotive clients
Shipping agency services: Phee Group handles port operations and cargo brokering, which are essential for managing vehicle imports and exports at greenfield and established ports in ASEAN

Leading Companies

5.25 Rhenus Logistics

Rhenus Logistics has significantly expanded its presence in the ASEAN automotive logistics market, leveraging over a century of global experience to deliver tailored, high-efficiency solutions. With operations in Thailand dating back 20 years, Rhenus has built a robust regional network offering comprehensive services including inbound and outbound logistics, warehousing, customs clearance, and multimodal transport.

In the automotive sector, Rhenus specialises in just-in-time and just-in-sequence deliveries, on-site assembly, and battery lifecycle management—critical for electric vehicle production. Their logistics solutions span the entire supply chain, from component provisioning to vehicle distribution, supported by advanced IT systems and lean operational models.

Rhenus's strategic growth in Southeast Asia is driven by a decentralised structure and a focus on niche markets like automotive, high-tech, and chemicals. Their Thailand operations serve as a regional hub, with investments in air freight infrastructure and cross-dock facilities near Suvarnabhumi Airport enhancing responsiveness and efficiency.

Committed to sustainability, Rhenus aims for carbon-neutral logistics by 2045 and is exploring biofuel alternatives. Their customer-centric approach, combined with continuous innovation and talent development, positions Rhenus as a key logistics partner for automotive manufacturers navigating ASEAN's dynamic and expanding market.

5.26 SCGJWD

SCGJWD Logistics Public Company is a leading integrated logistics and supply chain provider in ASEAN, formed through the merger of SCG Logistics and JWD InfoLogistics. The combined entity has become one of the region's largest integrated logistics and supply chain service providers, offering end-to-end solutions tailored to the automotive industry, operating across nine ASEAN countries and South China.

In the automotive sector, SCGJWD manages over 500,000 vehicles annually, accounting for nearly one-third of Thailand's total car production. It also handles logistics for around 50% of registered electric vehicles (EVs) in the country. The company is expanding its EV-related services, including import-export logistics for vehicle parts and after-sales support.

5.26.1 Automotive logistics services

Inbound logistics: Cross-border transport, customs clearance, and multimodal solutions (road, rail, sea, and air)
Warehouse and yard management: Specialised facilities for automotive parts, finished vehicles, and dangerous goods
Automotive yards: Located in strategic areas like Laem Chabang and Rayong, supporting both domestic and cross-border operations, vehicle storage, inspection, and distribution
Last-mile delivery: B2B and B2C transport, including relocation and value-added services

SCGJWD is also investing in digital platforms like the NSW Service Provider (NSP) to streamline customs and logistics data exchange. Its partnerships with firms like JUSDA and SWIFT enable cross-border logistics between China and ASEAN countries, including Vietnam, Laos, Malaysia, and Singapore.

5.27 Sinotrans / Sunsuria Bhd

Sinotrans Ltd, one of China's largest third-party logistics providers, has entered the ASEAN automotive logistics market through a strategic partnership with Malaysian firm Sunsuria Bhd. This collaboration, formalised via a Memorandum of Understanding (MoU), aims to establish a smart logistics park in Malaysia, aligning with China's Belt and Road Initiative (BRI). The venture is designed to leverage Malaysia's strategic location as a regional logistics hub and capitalise on infrastructure projects such as the East-Coast Rail Link and the Malaysian-China Kuantan Industrial Park.

Sinotrans brings extensive expertise in freight forwarding and logistics operations, which is expected to enhance cross-border e-commerce and supply chain efficiency across Southeast Asia. The partnership also supports the development of the ASEAN Automotive Design and Innovation Center (AADIC), which Sunsuria is developing in collaboration with IAT Automobile Technology, which will focus on importing legally modified electric vehicles from China and launching car-sharing services in Malaysia. This initiative is part of a broader effort to position Malaysia as a central hub for automotive research, talent development, and innovation in the ASEAN region.

Through this joint venture, Sinotrans is poised to play a pivotal role in transforming the ASEAN automotive logistics landscape, fostering technological advancement and regional integration.

Leading Companies

5.28 Tiong Nam Logistics

Tiong Nam Logistics Holdings Berhad plays a strategic role in the ASEAN automotive logistics market particularly through its infrastructure, regional network expansion, integrated logistics solutions, and partnerships with multinational automotive companies.

Headquartered in Malaysia, Tiong Nam operates a fleet of over 1,500 trucks and employing more than 3,000 staff, enabling robust regional coverage and has expanded its operations across key ASEAN countries including Thailand, Vietnam, Singapore, Laos, and Myanmar, offering services such as cross-border trucking, container haulage, heavy transportation, and warehouse management.

A notable development is its partnership with Chery Malaysia, a Chinese automotive brand, to manage spare parts distribution across Southeast Asia. This collaboration highlights Tiong Nam's growing involvement in automotive aftersales logistics, a critical segment supporting vehicle uptime and customer satisfaction.

Tiong Nam's logistics infrastructure includes over 1,500 trucks and a workforce of more than 3,000 employees, enabling it to serve both domestic and multinational automotive clients. Its facilities, such as the upcoming mega warehouse in Senai Airport City for Mercedes-Benz, demonstrate its commitment to supporting OEMs with scalable and efficient supply chain solutions.

As ASEAN's automotive sector shifts towards electric vehicles and regional integration, Tiong Nam is well-positioned to capitalise on increased demand for logistics services, leveraging its deep market knowledge and robust infrastructure to support the industry's growth and transformation.

5.29 Toyota Tsusho Thai Holdings Co. Ltd. (TTTH)

Toyota Tsusho Thai Holdings Co., Ltd. (TTTH), a subsidiary of Toyota Tsusho Corporation, plays a strategic role in the ASEAN automotive logistics market through its integrated supply chain operations and smart mobility initiatives.

5.29.1 Supply Chain Division

Toyota Tsusho Thai Holdings operates a Supply Chain Division that supports automotive manufacturers with end-to-end logistics solutions, including procurement, warehousing, and distribution of automotive components

These automotive logistics services include:

Global Parts Logistics: Managing procurement, consolidation, and delivery of automotive parts across ASEAN and other regions under the "V-V concept" (Value-Added and Virtual Business Supply). This includes minimising excess inventory and optimising logistics routes

Mobility Parts Supply: Acting as a Tier-1 supplier for OEMs, providing interior and exterior components, electronics (EV motors, converters), and safety systems like airbags and seat belts

Accessory and Conversion Services: Offering genuine and non-genuine accessories, and conversion services for specialised vehicles such as ambulances and cold boxes
TTTH has actively expanded its logistics and automotive parts services across the CLMV region—Cambodia, Laos, Myanmar, and Vietnam - supporting both its supply chain and manufacturing footprint across Southeast Asia

5.30 United Parcel Service (UPS)

UPS plays a significant role in the ASEAN automotive logistics market through its extensive global infrastructure, digital capabilities, and regional partnerships to support the growing automotive sectors across ASEAN. UPS offers a wide range of services including air and ocean freight, multimodal transport, warehousing and distribution, customs brokerage, and service and parts logistics - supporting automotive OEMs & suppliers.

UPS's presence in key ASEAN hubs such as Singapore, Bangkok, Ho Chi Minh City, Jakarta, and Kuala Lumpur enables efficient cross-border logistics and just-in-time delivery of automotive components. Its healthcare cold chain solutions and alternative fuel delivery fleet also align with the region's growing focus on sustainability and electric vehicle (EV) logistics. Despite being one of the top four global logistics providers, UPS operates in a highly fragmented ASEAN market. This competitive landscape pushes UPS to continuously innovate and localise its services to meet the diverse needs of ASEAN OEMs.

5.30.1 Automotive Supply Chain Solutions

Just-in-Time (JIT) Manufacturing Support: UPS delivers parts precisely when needed, helping manufacturers reduce inventory costs and improve production efficiency
Dealer Spare Parts Distribution: UPS designs centralised distribution models to ensure fast and reliable delivery to service centres and dealerships.
Reverse Logistics: Streamlined returns management minimises overstocks optimising inventory
Same-Day and Expedited Freight Services: UPS provides flexible transportation options, including next-flight-out and same-day courier services, for urgent automotive shipments.
Special Handling and Customs Brokerage: Services include inside delivery, stairs access, and customs clearance for international shipments

Leading Companies

5.31 Wallenius Wilhelmsen

Wallenius Wilhelmsen plays a significant role in the ASEAN finished vehicle logistics market by offering comprehensive end-to-end solutions that support automotive manufacturers across the region. Their services span ocean transportation, inland distribution, and advanced vehicle processing, ensuring vehicles are delivered in dealer-ready condition.

In key ASEAN markets like Thailand and Indonesia, the company operates vehicle processing centres at strategic ports and factory sites, providing services such as pre-delivery inspection (PDI), accessorisation, mechanical and paint repairs, and yard management.

These capabilities are crucial in a region experiencing rapid automotive growth, driven by rising production and exports, especially in electric vehicles (EVs). Wallenius Wilhelmsen's logistics infrastructure supports this expansion by enabling efficient handling, storage, and dispatch of finished vehicles, including temperature-controlled transport and compliance testing for EVs.

Their involvement also includes partnerships and investments aimed at optimising the entire lifecycle of vehicle logistics, from factory to final delivery. By integrating global expertise with local operations, Wallenius Wilhelmsen helps OEMs in ASEAN streamline supply chains, reduce lead times, and meet diverse market demands. This strategic presence positions the company as a key enabler of automotive growth and export efficiency across Southeast Asia.

5.32 YCH Group

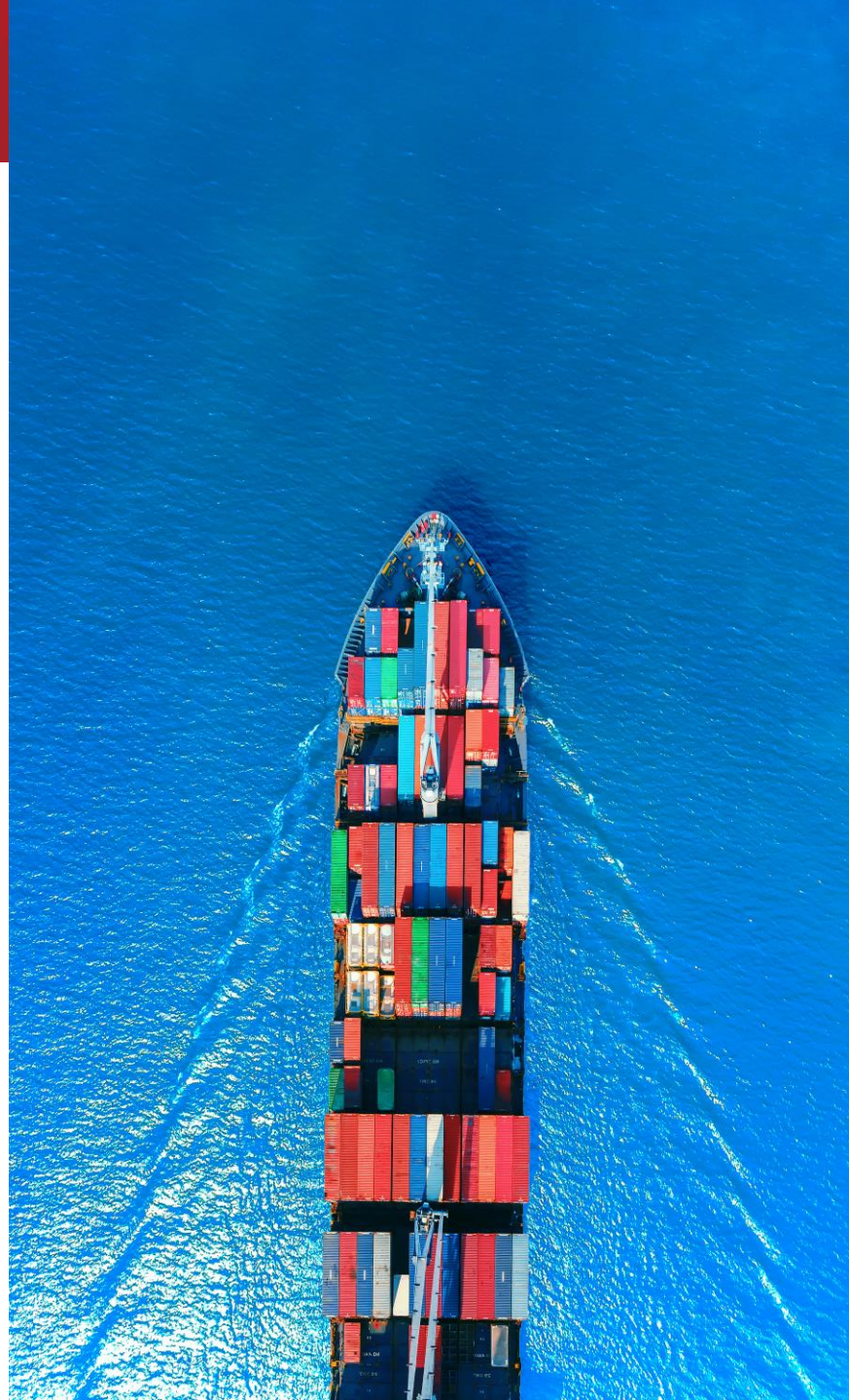
YCH Group, a Singapore-based logistics provider, playing a meaningful role in the ASEAN automotive logistics market through its infrastructure investments, regional partnerships, and supply chain initiatives, such as multimodal SuperPorts and the ASEAN Smart Logistics Network (ASLN). These initiatives enhance regional connectivity, reduce logistics costs, and support the growing demand for supply chain diversification amid global trade shifts.

The flagship Vietnam SuperPort™, located in Vinh Phuc Province, is an 83-hectare logistics hub integrating rail, road, air, and sea transport, and aims to be Southeast Asia's first Net-Zero logistics hub, integrating clean energy and smart technologies. Operational since 2023, it serves as a model for future SuperPorts, planned over the next five years in Vietnam, Cambodia, Malaysia, Indonesia, the Philippines, and Laos with investment of around $300 million each.

YCH's strategy aligns reduced logistics costs and enhances Vietnam's competitiveness in automotive exports and supply chain connectivity, with the "China Plus One" approach, helping global manufacturers shift operations to tariff-friendly ASEAN markets. Through its 7PL™ model, YCH strategic infrastructure investments, regional partnerships, and supply chain innovation initiatives, offers end-to-end solutions across more than 100 cities in the Asia Pacific.

YCH is a key driver of the ASEAN Smart Logistics Network (ASLN), an initiative to build interconnected logistics and support automotive supply chain resilience, EV logistics and component distribution, and cross-border trade facilitation.

YCH signed an MoU with Vientiane Logistics Park Co., Ltd. (Laos) to enhance supply chain connectivity through the Laos Logistics Link (LLL) and LaosConnect™, part of the wider SGConnect™ programme to support cross-border automotive logistics between Laos, China, and ASEAN nations.



6. Conclusions

Automotive LOGISTICS

Conclusions

Many of the trends and challenges of the ASEAN region also present considerable opportunities –

1) Focus investment in growth areas - ASEAN a growing, dynamic automotive market

The ASEAN region is expected to be a growing, dynamic automotive market, production hub, and fast-growing automotive logistics market with an expected CAGR of 8.0% over the 2026-2036 period. Whilst that growth is uneven amongst the leading ASEAN countries, for Thailand, Indonesia and Vietnam this growth is expected to be substantial with Indonesia and Vietnam doubling production volumes. This create opportunities for logistics providers to target investment to develop new capacity to cater to this volume growth.

Infrastructure investment needs

Many ASEAN countries face underdeveloped transport infrastructure. While Thailand, Malaysia, and Singapore have good infrastructure, some regions have limited and poor-quality road connectivity, congested ports, disrupted routes (e.g., Strait of Malacca), and limited rail networks. There is therefore a growing need to invest heavily in infrastructure upgrades - port expansions, improved rail connectivity, and logistics parks. Thailand and Vietnam, are expanding bonded zones and logistics hubs to attract OEMs and Tier 1 suppliers.

EV and battery supply chain growth requires specialisation in logistics services

The relatively high rate of investment and demand growth of electric vehicles in the ASEAN region, notwithstanding the constraints around charging infrastructure, is indicative of a range of new and emerging logistics opportunities for specialised services for gigafactories, the battery supply chain, temperature-controlled transport, in-plant logistics, reverse logistics and FVL where specialised services are required.

2) Exploit structural changes in ASEAN region -

ASEAN as an offshore manufacturing base

The “China Plus One” strategy is encouraging global manufacturers to diversify operations by shifting production to ASEAN countries. This helps mitigate risks from tariffs and geopolitical tensions while leveraging ASEAN’s cost advantages. As a result, the region is emerging as a key offshore manufacturing base for many OEMs. Therefore, local assembly and parts manufacturing is being prioritised to strengthen resilience and reduce lead times.

Shifting OEM landscape creates new opportunities

Japanese OEMs have long dominated the ASEAN automotive market, with limited involvement from European and US brands. However, a significant shift is underway. The rise of Chinese and Korean OEMs is reshaping the competitive landscape and logistics strategies in ASEAN. Chinese EV brands like BYD and Chery are rapidly gaining market share, leveraging competitive pricing and advanced software-defined vehicles. South Korean OEMs such as Hyundai and Kia are also expanding their presence. This disruption is prompting changes in logistics planning, including new battery supply chains and distribution models tailored to EVs.

Integrate supply chains to reduce complexity

Automotive supply chains in the ASEAN region are fragmented, multi-tiered, and regionally dispersed. Many plants rely on completely knocked down (CKD) kits, assembling vehicles from imported components. This lack of integration and visibility across suppliers and logistics providers leads to inefficiencies and delays. Whilst Vietnam and the Philippines are seeing rapid growth in vehicle sales concerted efforts are being made to integrate more into regional supply chains.

3) Strategies to remain efficient, flexible, & resilient -

Form strategic partnerships and alliances

Because ASEAN countries, and EV adoption, are growing at different rates, this introduces extra complexity. To navigate this, multinational logistics companies are forming strategic alliances to tap into the regional expertise of local LSPs. OEMs also often partner with LSPs, technology companies, and governments to co-develop infrastructure such as EV charging networks, sales and smart distribution centres. These alliances help stakeholders cope with challenges such as harmonising standards, streamlining documentation, uncertainty, building resilience, vehicle electrification and migrating to sustainable logistics modes.

Focus on multimodal transport solutions to improve efficiency and resilience

The island geography of the ASEAN regions puts particular focus upon developing multimodal solutions that can navigate the region effectively. Investing in multimodal solutions also increases resilience in the context of changing market conditions, natural disasters, and unforeseen circumstances.

View digital transformation as key for efficiency, visibility and resilience

Many of the region’s logistics processes are manual and inefficient. As the regions logistics capabilities grows, there is therefore a compelling need to invest in digitalisation to enhance transparency, and optimise supply chain visibility, and improve resilience in times of fluctuation volumes and unforeseen events. Advanced digital tools being introduced include AI, control towers, smart logistics networks, automated storage systems, robotics, IoT-enabled inventory management, digital twins, and blockchain.

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C.H. Robinson
CJ Logistics
CJ Korea Express Malaysia Sdn Bhd
CEVA Logistics
CMA CGM
Cogent
COSCO Shipping International (Singapore) Co., Ltd.
Dachser
DB Group
DB Schenker
DHL Group
DP World
DSV
Gemadept Logistics Holding
Gemadept Shipping Holding
Geodis
Hellmann Worldwide Logistics
Hitachi Asia (Thailand)
Hitachi Transport System (HTS)
Hyundai Glovis and HMM Co., Ltd.
Imperial Logistics
JAS Worldwide
JUSDA
Kerry Logistics Network (KLN)
KGL (K Line – Gemadept Logistics)

Logistics companies

Kintetsu World Express (KWE)
“K” Line
Kuehne + Nagel
Maersk
Mazda Logistics and Yusen (Asia) Co., Ltd.
MSC
Nippon Express
Nippon Yusen (NYK Group),
NX South Asia & Oceania
Phee Group
Rhenus Logistics
Sinotrans Ltd.
SNCF
SCGJWD Logistics Public Company
Sunsuria Bhd.
Swift
Tasco Berhad
Tiong Nam Logistics Holdings Berhad
Toyota Tsusho Thai Holdings Co., Ltd. (TTTH)
Toyota Tsusho Corporation
UPS
Vientiane Logistics Park Co., Ltd. (Laos)
Wallenius Wilhelmsen
YCH Group
Yusen Logistics

Automotive OEMs

BMW
BYD
Changan Automotive Singapore
Chery
Cherry Malaysia
Daihatsu (Astra Daihatsu Motor)
Ford
Ford Vietnam
Foton
Geely Auto
Great Wall Motor
Hino
Honda
Honda Automobile (Thailand)
Honda Cars Philippines
Honda Vietnam
Honda Prospect Motor
Hyundai Motor Manufacturing Indonesia
Hyundai Motor Group
Hyundai Thanh Cong
IAT Automobile Technology
Inokom
Isuzu
Isuzu Philippines
Isuzu Motors Thailand
Kia

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MAN Trucks
Mazda
Mercedes-Benz
Mitsubishi
Mitsubishi Motors Philippines
Mitsubishi Motors Thailand
Perodua
Peugeot
Porsche
Proton
PT Toyota Motor Manufacturing Indonesia (TMMIN)
PT Mitsubishi Motors Krama Yudha Indonesia
Scania
Skoda
Song Cong Diesel
Suzuki
Suzuki Indomobil Motor
Thaco (Truong Hai Auto Corporation
Toyota Motor Thailand
Toyota Motor Philippines
Toyota Motor Company Singapore
Toyota (UMW)
Toyota Vietnam
Yanmar
VinFast
Volkswagen
Volvo
Wuling

Tier suppliers

AAPICO Hitech
Adient Summit Co., Ltd.
Aisin Indonesia
Aisin Takaoka Asia Co., Ltd.
Antolin
APM Automotive Holdings Berhad
ASEAN Automotive Limited
Asian Transmission Corporation (ATC)
Automotive Corporation (Malaysia) Sdn. Bhd. (ACM)
Autophil Zone
Bosch Philippines
Delloyd Group
Denso Malaysia Sdn Bhd
Denso Philippines
Denso Thailand
Denso Vietnam
DRB-HICOM
Fujitsu Ten Corporation of the Philippines
G7Auto
Gotion
HICOM Automotive
Hicom-Teck
Hyundai Thanh Cong Parts
Ingress Corporation
Ingress Industrial (Thailand)
KYB
KYB-UMW Malaysia Sdn Bhd
LAMCOR – (Laguna Auto-Parts Manufacturing Corporation)
Malaysian Automotive Lighting Sdn Bhd
Marelli
Mitsubishi Electric
Musashi Auto Parts Co., Ltd.

Tier suppliers

New Hoong Fatt Holdings Berhad
NHK Spring (Thailand) Co., Ltd.
Nitto Denko Philippines Corporation
Nipress Tbk
PHN Industries
Philippine Auto Components, Inc. (PAC)
PT Astra Otoparts Tbk
PT ADVICS Indonesia
PT Gajah Tunggal
PT Multistrada Arah Sarana (Michelin Group)
PT Braja Mukti Cakra (BMC)
PT Roda Prima Lancar
PT Asian Isuzu Casting Center (AICC)
RB-HICOM
Robert Bosch Automotive Technologies (Thailand) Co., Ltd.
Roberts AIPMC (Automotive and Industrial Parts Manufacturing Corporation)
Samco (Saigon Transportation Mechanical Corporation)
Sapura Industrial Berhad
Thaco Auto Parts
TMT Motors
Vietnam Auto Parts Co., Ltd.
Zeder Vietnam
Truong Hai Spare Parts
Thai Radiator Manufacturing Co., Ltd.
Thai Summit Group
UMW
United Bearing Industrial Corporation (UBIC)
Valeo Automotive (Thailand)
VinFast
Yazaki-Torres Manufacturing, Inc.
ZF (Thailand) Ltd.

8. Credits & Methodology

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ASEAN automotive logistics market definition: The market definition of 'ASEAN' in this report refers to the 10 south east Asian countries. Our market definition refers to revenues derived from automotive logistics services within ASEAN and surrounding waters only. The international nature of logistics means that some inbound components and finished vehicles transported outside of ASEAN have a proportion of their journey within the ASEAN region. However, we are not including the ocean container or section of those routes in international waters.

Our market definition focuses upon logistics transport modes (road, rail, sea, and air) and while there are inevitably some areas of overlap, our definition does not generally include revenues for port services, warehousing, packaging, or in-plant logistics.

ASEAN automotive logistics market sizing: To quantify and evaluate the overall market sizing and subsegments, we used a blended methodology that comprised a bottom-up calculation combined with a top-down approach to align the market sizing and validate with other industry estimates. However, we acknowledge the limitations of any methodology and that market sizes are estimates based on our reasonable assumptions. We welcome clarification if any more definitive data can be provided.

ASEAN automotive logistics market forecasting: Market forecasting is achieved by evaluating the wide range of macroeconomic factors that influence automotive logistics revenues including likely vehicle production and sales volumes At a more granular level, we forecast the automotive logistics modes and types by examining the various trends within each of those segments and align this with deep market insight from our industry contacts, extensive events, news coverage and expert interviews.

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