

Australia Courier, Express, and Parcel (CEP) - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2024 - 2030)

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Abstracts

The Australia Courier, Express, and Parcel (CEP) Market size is estimated at 11.13 billion USD in 2024, and is expected to reach 15.02 billion USD by 2030, growing at a CAGR of 5.12% during the forecast period (2024-2030).

The demand for courier, express, and parcels is expected to grow owing to growth of e-commerce

Several courier pickup and delivery services in Australia came up during the review period (2016-2021). In 2016, 15,788 businesses were operating in the CEP market. This number increased to 24,440 businesses in the market in 2020, then to 24,731 businesses in 2021. In 2022, the number of businesses operating in the Australian courier market was about 29,786. In 2023, Australia Post, worked cooperatively with its workforce and the Communication Workers Union to trial a new model for mail delivery which resulted in expansion of delivery points by more than 10% per round, and enabled postal workers to carry up to 20% more parcels.

E-commerce is a major driver for domestic and international CEP segment demand. The e-commerce market increased by 35.09% YoY in 2020 and reached about USD 28 billion due to increased demand owing to social distancing norms and work-from-home circumstances due to the global pandemic spread. The main category driving the parcel volumes was the fashion segment, and the electronics segment. The gross value added (GVA) by Australia's transport, postal, and warehousing industry as of December 2021 was around USD 61.38 billion. Also, in 2020, of the total cross-border online purchases

made in Australia, 41% were purchased from China and 24% from the United States.

In 2022, post offices in Australia conducted 192 million transactions. Also, Australia Post, the national postal service, delivered 526 million parcels in the 2022 financial year. This has played a major role in the increased contribution from the domestic and international CEP segment during the historic period reaching up to 2022 largely due to increasing e-commerce. Also, e-commerce, a major driver, is projected to touch USD 54.68 billion by 2027 and is expected to fuel CEP market growth.

Australia Courier, Express, and Parcel (CEP) Market Trends

Australia invested USD 120 billion in infrastructure projects, focusing on nation-building and land transport projects

The Australian market encompassing transport, postal, and warehousing displayed growth across key metrics during the fiscal year 2021-22. Earnings within the transport industry division and its income value added (IVA) surged by 14.4% (amounting to USD 4.7 billion) and 15.0% (USD 10.8 billion), respectively. With a workforce of 122,810 individuals recorded by the end of June 2021, the transport support services subdivision accounted for 19.2% of the overall employment within the division, establishing itself as the second-largest employing subcategory after road transport.

In 2022, the declines in division earnings were predominantly driven by a 7.6% decline in the transport support services sub-division, including airport activity. Around 62.7% decline in sales and service income for air and space transport reflected a significant decline in air travel due to COVID-19. Road freight transport is the largest employing sub-sector in the transport and logistics sector, followed by postal and courier pickup and delivery services and road passenger transport, with water transport support services employing the least number of people.

The Australian Government remains resolutely dedicated to a robust 10-year infrastructure pipeline valued at USD 120 billion, focusing on delivering land transport projects that hold national significance and contribute to shaping the nation's future. The 2023-24 budget represents a stride forward in establishing an infrastructure investment pipeline integral to nation-building endeavors. This initiative forms the bedrock for constructing a sustainable and credible lineup of projects, selected based on diverse

economic and societal goals, encompassing regional connectivity, quality of life enhancement, and safety enhancement.

Tightening global oil markets and the weakening Australian dollar led to an increase in fuel prices in Australia

During 2021-2022, diesel prices rose by 40.1%, reaching 176 cents per liter (USD 1.76). Diesel prices tend to follow trends in the global price of crude oil, with oil prices projected to rise sharply in the current year. With global oil consumption recovering following the COVID-19 pandemic, supply concerns led oil prices to rise again due to the Russia-Ukraine War during 2022-23, thus increasing retail diesel prices. The federal government implemented a temporary 50% reduction in the fuel excise in March 2022 to help offset rising costs, which ended in September with the fuel excise returning to its full rate, causing motorists to pay more at the pump.

Petrol prices in Australia's major cities climbed to an average of USD 1.18 per liter in October 2021, the highest since 2014, when adjusted for inflation. While prices plummeted to record lows during the COVID-19 pandemic in 2020, the cost of fuel in Australia has been rising steadily since November 2020.

According to the Australian Institute of Petroleum, the average retail price for petrol in Australia hit 196.5 cents (USD 1.96) in August 2023. Since the federal government's halving of the fuel excise ended last September, the national average weekly petrol price has been hovering around 175 to 180 cents a liter (USD 1.75-1.8). The average weekly petrol price in the capital cities sits at 197.5 cents a liter (USD 1.97), with Sydney, Adelaide, and Hobart recording an average weekly price of more than USD 2 a liter, while Brisbane had the lowest average price of 188.2 cents a liter (USD 1.882). Also, the average national diesel price hit a nearly eight-month high of 206.9 cents a liter (USD 2.06). The tightening global oil market and the weakening Australian dollar are responsible for rising petrol prices.

Australia Courier, Express, and Parcel (CEP) Industry Overview

The Australia Courier, Express, and Parcel (CEP) Market is moderately consolidated, with the top five companies occupying 63.94%. The major players in this market are

Australia Post, DHL Group, FedEx, Singapore Post and Toll Group (sorted alphabetically).

Additional Benefits:

The market estimate (ME) sheet in Excel format

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