

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

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Abstracts

The Brazil Courier, Express, and Parcel (CEP) Market size is estimated at 3.17 billion USD in 2024, and is expected to reach 4.41 billion USD by 2030, growing at a CAGR of 5.66% during the forecast period (2024-2030).

E-commerce is driving the domestic and international CEP demand

E-commerce user penetration is projected to reach 66.7% by 2027. Cross-border e-commerce demand is thus pushing companies to expand CEP services. For instance, Cainiao, a logistics company of Alibaba expanded in the CEP market in 2022. The company launched its first parcel distribution center in Brazil, which is a significant addition to its regional network of sorting centers. The company aims to utilize and expand infrastructure for intra-city and cross-border logistics services and grocery deliveries. The company currently operates 8 weekly chartered flights between China and Brazil and plans to add more air and sea routes between the countries.

In 2020, Brazil Post was the leading parcel courier based on the number of parcels delivered in Brazil. The Brazilian postal service provider held over half of the parcel shipping market, with a 51% market share in the country in 2020. However, in 2020, Brazil Post lost both parcel volume and revenue market share to competitors. The top six carriers in Brazil accounted for 71% of the country's parcel shipments by volume. Brazil Post saw the biggest decrease in market share by revenue from 54% in 2019 to 39% of the market in 2020 and by volume from 66% in 2019 to 51% in 2020.

E-commerce was a major driver for domestic and international CEP market growth and demand in the country in 2021. The electronics segment was the most popular e-commerce segment in terms of the total number of orders, followed by fashion, personal and household care, toys, hobby and DIY, and furniture. With e-commerce projected to reach USD 71.68 billion by 2027, the CEP market is expected to grow exponentially.

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

In 2022, Brazil secures USD 47.27 billion in logistics investment and expands privatization efforts to bridge infrastructure gap

The Brazilian transportation industry includes cargo, passenger rail, logistical infrastructure, highways, ports, public transportation, urban mobility, and intelligent transportation systems. Since trucks are the primary means of moving cargo, logistics are more expensive in Brazil. Around 12% of the country's GDP (4% higher than in the United States) goes toward logistics costs, which is inefficient due to a lack of adequate transportation infrastructure.

In 2022, the Government of Brazil (GoB) pursued an extensive privatization effort through a pipeline of concession auctions and regulatory reforms aimed at attracting financing to help narrow Latin America's most significant infrastructure funding gap. The federal government is expected to have secured nearly BRL 250 billion (USD 47.27 billion) in logistics investment by the end of 2022. The rapid growth in occupancy rates of available logistics warehouses, primarily due to increased online shopping during the worst part of the pandemic, continued in 2021.

The Ministry of Infrastructure (MInfra) activities included virtual roadshows for foreign audiences to showcase concession opportunities in railways, airports, highways, and ports. In 2022, the government invested BRL 5.28 billion (USD 998.39 million) in three blocks: Rio de Janeiro - Minas Gerais (7 airports), North Two (7 airports), and Sao Paulo - Mato Grosso do Sul (7 airports).

Due to an abrupt increase in global oil prices, the average gasoline prices increased by 16.3% in Brazil

With increased international prices, an oil producer and refiner Petrobras-based company raised wholesale diesel prices by 24.9%, gasoline prices by 18.8%, and LPG prices by 16.1% in 2022. The primary fuel used to produce food in Brazil is liquefied petroleum gas, which is directly correlated with oil barrel prices.

Due to the increase in oil prices in 2021, gasoline and diesel costs rose throughout Brazil. According to official statistics, fuel costs in Brazil climbed by more than 33% in the same year, resulting in more than 12% annual inflation. Residential gas prices increased by an average of 35%. Under the new law (n. 190/2022), the ICMS manufacturing tax is computed using a fixed number rather than a percentage of the pump price. In communities without access to conventional natural gas distribution networks, the ICMS contributes around 14% of the cost of a liter of diesel or a 13-kilogram LPG tank at the current pump price. The ICMS computation for biodiesel, diesel, gasoline, hydrous ethanol, and LPG would be adjusted. At the end of 2022, the Brazilian government was also expected to reduce or eliminate federal fuel taxes on biodiesel, diesel, and LPG for domestic production and imports.

The Brazilian state oil company Petrobras approved a new fuel pricing policy for gasoline and diesel in May 2023 that sharply lowers costs by 13%. In August 2023, due to an abrupt increase in global oil prices, Petrobras planned to hike average gasoline prices by 16.3% to BRL 2.93 (USD 0.589) per liter, while diesel prices would be raised by an average of 25.8% to BRL 3.80 (USD 0.718).

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

The Brazil Courier, Express, and Parcel (CEP) Market is moderately consolidated, with the top five companies occupying 59.99%. The major players in this market are Azul Cargo Express, Empresa Brasileira de Correios e Telegrafos, FedEx, GOL and Total Express (sorted alphabetically).

Additional Benefits:

The market estimate (ME) sheet in Excel format

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