

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

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Abstracts

The Chile Courier, Express, and Parcel (CEP) Market size is estimated at 0.74 billion USD in 2024, and is expected to reach 1.07 billion USD by 2030, growing at a CAGR of 6.45% during the forecast period (2024-2030).

CEP market is growing despite devaluation of Chilean peso

The domestic and international CEP market steadily grew during the review period, irrespective of various economic factors. The Chilean peso witnessed a severe devaluation in June 2022 as a result of rising consumer prices, which also caused inflation rates to rise by around 12.5%. In response, the Central Bank increased interest rates to a historic high of 9.75% in July 2022. Despite these economic shocks, clubbed with the residue effects of the pandemic and the Ukraine-Russia war, the overall CEP market witnessed marginal and steady growth in 2022. Following the trend, the CEP value is projected to record a CAGR of 6.80% during 2023-2029.

Domestic e-commerce has been the major demand generator for the CEP market. E-commerce experienced growth over the last decade due to Chile's rapid and continuing technological infrastructure development and the launch of 5G service in December 2021. In 2021, B2C e-commerce sales reached USD 7.86 billion, which was a 38.14% increase compared to 2020.

Major e-commerce end users drove the demand for the CEP market in 2022. Electronics, toys, hobby & DIY, and fashion goods also generated significant CEP

delivery demand in 2022. The largest player in the Chilean e-commerce market was [paris.cl](#), with a revenue of USD 1,237.1 million in 2022. It was followed by [falabella.com](#) and [ripley.cl](#) as the second and third-largest stores, with USD 1,120.5 million and USD 628.1 million, respectively. Collectively, the top three stores account for 45.9% of the top 100 online stores' revenue in Chile. With e-commerce user penetration projected to reach 69.4% by 2027, the CEP market is expected to grow further.

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

Chile's transport and storage sector made a strong recovery with 27.9% growth in 2022, fueled by maritime services

The transport and storage sector steadily recovered in 2021, with a notable 24.41% YoY growth in its contribution to GDP. In 2022, the sector continued to expand, particularly in transportation, which saw a substantial 27.9% growth, primarily attributed to the expected growth in maritime services. The rise in services was primarily driven by improvements in road infrastructure and increased demand for storage solutions.

The "Chile Over Rails" initiative encompasses a comprehensive plan comprising 27 projects to be implemented by 2027, with a combined investment of USD 5 billion. These projects aim to modernize passenger and freight railway infrastructure managed by the Chilean Railways Company, Empresa de Ferrocarriles del Estado (EFE). The overarching objective is to triple annual ridership to 150 million passengers and double the freight transportation volume to 21 million tons by 2027. Among these projects is the Alameda (Santiago) Melipilla Railway, which opened for bidding in June 2021 and entails a USD 1.5 billion investment for a 37-mile track extension, anticipated to be finalized by 2025.

Chile's Public Works Ministry (MOP) announced a USD 4.7 billion concessions plan in 2021, under which highway projects would cost around USD 11 billion over the next five years. Other projects include hospitals, airports, cable cars, trams, and re-tenders for groups of jails. For instance, the value of roadwork projects over the five years exceeded USD 11 billion. The re-tenders for Routes 78 (USD 892 billion) and Route 68 (USD 903 billion) are the highest-value initiatives in the portfolio of public tender for the growth and development of the logistic infrastructure.

Chile proposes mitigating fuel hikes by doubling stabilization fund to USD 1.5 billion

The price of diesel in Chile increased by 35.48% in 2022, compared to 2021 and reached USD 0.84 due to fluctuations in the international demand for distillate fuels and restrictions on the supply side. Gasoline Prices in Chile remained unchanged at 1.42 USD/Liter in August 2023. As of March 2022, the average diesel price in Chile was reported at 1.15 USD per liter. Chile reported one of the highest gasoline prices in Latin America and the Caribbean, with an average price of 1.58 USD per liter in June 2023.

Due to its small oil production, the South American countries are extremely vulnerable to changes in the price of oil on the world market. Chile's crude oil imports were reported at 145.547 barrels/day in December 2022 a decrease from the previous number of 164.159 barrels/day for December 2021. After oil prices rose sharply due to Russia's invasion of Ukraine, the Chilean government proposed doubling the size of a fund that helps cushion fuel price spikes to USD 1.5 billion. Despite the struggling economy and rising inflation, the government promised to increase social programs while exercising fiscal restraint.

In 2021, the Chilean Ministry of Energy passed the country's first energy efficiency law, Law 21305-2021, which impacts construction, housing, heating, and transportation. The Ministry of Energy established interoperability standards for electric vehicle (EV) charging infrastructure and designated hydrogen as an official fuel source. Chile has ambitious EV sales targets of 100% zero-emission technologies for light- and medium-duty vehicles, urban buses, and large machinery by 2035.

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

The Chile Courier, Express, and Parcel (CEP) Market is moderately consolidated, with the top five companies occupying 43.44%. The major players in this market are Chilexpress, DSV A/S (De Sammensluttede Vognd af Air and Sea), Empresas Copec SA, Redmegacentro SA (including Megalogistics) and United Parcel Service of America, Inc. (UPS) (sorted alphabetically).

Additional Benefits:

The market estimate (ME) sheet in Excel format

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