

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

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## Abstracts

The India Courier, Express, and Parcel (CEP) Market size is estimated at 8.58 billion USD in 2024, and is expected to reach 15.93 billion USD by 2030, growing at a CAGR of 10.87% during the forecast period (2024-2030).

Steady demand for CEP market in India largely due to increasing e-commerce penetration

E-commerce is a major driver of domestic and international demand for courier, express, and parcel services. Owing to the growing internet user base and favorable market conditions, India has a lot of potential in the e-commerce industry. Growing at an exponential rate, the market value of the e-commerce industry in India was approximately USD 57.45 billion in 2022. This number is estimated to reach USD 107.10 billion by 2027. The current e-commerce penetration rate in 2023 is nearly around 76.7%.

In India, 11 parcels per household were produced in 2021. Blue Dart Express was the leading courier service company in India in terms of market capitalization, with approximately USD 2.09 billion during 2021. Allcargo Logistics was the second leading courier company in the country in 2021, with USD 886.97 million. However, the industry was concentrated in 2020, with the top five companies accounting for 59.1% of its total turnover. The total number of companies in the Indian CEP market also increased to 1,168,145 units in 2020.

In 2021, the funding for e-commerce amounted to about USD 11 billion in India. This was a significant increase compared to the previous year's funding of USD 900 million. About 100% FDI is allowed under the automatic route in B2B e-commerce in India through the marketplace model of e-commerce. About 100% FDI is allowed under the government approval route for e-commerce from food retail companies, provided products retailed are manufactured and produced in India. All these factors are driving the overall parcel volumes, especially domestic parcel volumes in India.

## India Courier, Express, and Parcel (CEP) Market Trends

The road sector dominates India's transportation industry, contributing around 3.75% to GDP

India's road transportation services led the pack in 2021, contributing the most substantial gross value added (GVA) at over INR 3 trillion (USD 36.3 billion). This marked a decrease from the preceding fiscal year. Communication and broadcast services secured the second position, with a GVA of around INR 2.2 trillion (USD 26.62 billion) during the same period. The logistics sector is pivotal in facilitating the seamless flow of goods and services within the country and internationally. This diverse array encompasses prominent domestic entities, global industry frontrunners, the postal service's express division, and emerging startups specifically aiming to facilitate e-commerce deliveries.

The transportation industry contributed around 3.75% of the GDP, and the road sector dominates. More than 50% of freight and 90% of passenger traffic are handled by road. Government and private investments, rising exports, the increasing interstate movement of goods and passengers, the growing FMCG sector, and rising disposable incomes are the major drivers of the transportation industry in India. To boost connectivity across the country, 100% FDI has been allowed in the roads and highway sector via automatic routes.

India's road transport sector registered an improvement in prices in December 2021 due to higher industrial activity, even as demand for transportation from the consumer goods sector declined. In 2022, India was a major manufacturing hub in Asia, and infrastructure advancements made it easier for manufacturers to import goods and guarantee a higher export level. Due to the significant advancement in rail transportation that ensures faster transit times, it cannot operate on a low inventory

model.

Owing to numerous tax hikes in the country, fuel prices are expected to increase in 2023

Fuel costs sky-rocketed to current levels due to the combined effects of rising benchmark Brent prices and numerous tax hikes over the past few years. According to the All-India Motor Transport Congress, which represents more than 14 million truckers and bus and tourist vehicle operators, the soaring fuel prices are impacting India's truckers as they have limited ability to pass on the rising prices, which account for 70% of the cost of operating a truck. India's oil demand growth is expected to reach 2,46,000 barrels per day (bpd) in 2023, revised higher by 14,000 bpd on robust petrol and diesel sales. The country's oil demand will likely grow by about 11% in 2024.

As per the official data by Petroleum Planning and Analyses Cell, petrol prices rose by a whopping USD 0.28 per liter between April 1, 2020, and March 31, 2021, the highest ever levels to be recorded so far. India's petrol demand rebounded above pre-COVID-19 levels in 2021 and is expected to be 24% higher than 2019's level in 2023.

The diesel price increase was less sharp than the increase in petrol prices due to VAT cuts offered by several state governments to keep the price rise of diesel under manageable levels. Oil marketing companies have been lenient on diesel price rises lately, reducing the quantum of a hike compared to petrol. In 2022, global crude prices reached an all-time high as Russia's invasion of Ukraine threatened to curtail supply, whereas the impact on fuel in India has been minimal. Domestic gasoline demand, used mainly in passenger vehicles, is expected to rise by 7.1% to 37.8 million tons in 2023. However, fuel prices were hiked, and the consumption demand decreased due to high inflation, which impacted the economic recovery of India.

## India Courier, Express, and Parcel (CEP) Industry Overview

The India Courier, Express, and Parcel (CEP) Market is fragmented, with the top five companies occupying 29.59%. The major players in this market are Blue Dart Express, Delhivery Limited, DHL Group, FedEx and Instakart Services Private (sorted alphabetically).

Additional Benefits:

The market estimate (ME) sheet in Excel format

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