

International Express Service - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2024 - 2030)

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Abstracts

The International Express Service Market size is estimated at 65.44 billion USD in 2024, and is expected to reach 96.77 billion USD by 2030, growing at a CAGR of 6.74% during the forecast period (2024-2030).

Only 3% of e-commerce revenue was from cross-border transactions in the US and Canada as of 2022

In North America, small retail businesses benefit from reduced expenses by express delivery carriers, resulting from the implementation of the United States-Mexico-Canada Agreement (USMCA). Similarly, the countries in Asia-Pacific have launched several initiatives to promote cross-border trade, including simplifying customs procedures and reducing trade barriers. This has created a more favorable environment for international express services to operate. For instance, India signed a Comprehensive Economic Partnership Agreement (CEPA) with the UAE.

The COVID-19 pandemic and e-commerce growth fueled the international express service market, as consumers ordered more online. Partnerships between courier companies and e-commerce players are becoming more common in the region to provide international express delivery services. For instance, DHL announced a partnership with BigCommerce, an e-commerce platform for fast-growing and established B2C and B2B brands, to help online business owners expand their portfolio of products worldwide. As of 2022, only 3% of e-commerce revenue was from cross-border transactions in the United States and Canada. Whereas in Mexico, cross-border

accounted for 5% of e-commerce revenue. Over the upcoming years, cross-border B2C e-commerce in North America is expected to expand gradually.

International express services for medical devices have been increasing due to several factors, including increasing demand for faster and more convenient healthcare services. North America (especially the US) dominates the global medical courier market due to the presence of some of the biggest healthcare courier service providers. International express delivery services for healthcare products are expected to grow in the coming years.

Globally growing international express delivery services owing to increasing demand, cross-border trade, and rising e-commerce

The United States dominates the market in North America. Major retailers in the United States provide international same-day and express delivery, specifically via air cargo, to more than 200 locations globally, as 67% of Americans expected same-day delivery in 2021. Retailers are able to pick up some deliveries under 60 minutes for international same-day delivery shipping. Some companies operated more than 2,000 daily flights specifically to facilitate same-day and time-sensitive deliveries as of 2022. FedEx, DHL, and UPS are some of the main retailers providing these services.

In 2022, Germany's textile and clothing trade drove demand for international express services. Germany exported textiles worth USD 40.8 billion and imported goods worth over USD 62.5 billion. China was the top clothing trading partner, and Switzerland was the major export market. Also, France's perfumes and cosmetics trade created significant demand. Imports from the United States alone played a crucial role, valued at USD 57 billion, in generating demand for international express services.

International express demand has also been significant in countries like China and India. For instance, the volume of intra-city, long-distance, and international/Hong Kong, Macao, and Taiwan express delivery business accounted for 11.6%, 86.6%, and 1.8% of the total express delivery business volume, respectively. ASL in India restarted Quikjet as demand for next-day and same-day air transport increased. Amazon Air launched an air cargo service in India in 2023. The aim is to speed up deliveries, for which it invested in Quikjet to transport packages for Amazon across four major Indian cities exclusively. Amazon Air has 110 jets that reach 70 locations worldwide.

Global International Express Service Market Trends

The North American transportation and storage market increased to 21.35% in 2022, valued at USD 642.60 billion, with investment boost

Asia Pacific is experiencing increased demand for transportation, especially in shipping, which handles a significant portion of global seaborne trade. This region boasts nine of the world's busiest container ports and accounts for more than 40% of global surface freight transport. By 2050, freight transport demand in the region is projected to triple. Meanwhile, Germany has become a leader in the transportation and warehousing sector, surpassing France and the United Kingdom, ranking third globally in imports and exports. To improve transportation infrastructure, the German government plans to invest over EUR 12 billion (USD 12.81 billion) in federal highways and about USD 1.81 billion in waterways in 2022.

Global foreign direct investment (FDI) flows in 2022 fell by 24%, totaling USD 1,286 billion, or a 5% decrease when excluding Luxembourg, compared to the previous year. The United States remained the top destination for FDI inflows, receiving USD 318 billion, followed by China with USD 180 billion, although at lower levels. Cross-border merger and acquisition (M&A) activity slowed down with fewer deals, while the outlook for greenfield investment remained positive.

Transportation and storage in North America saw a significant growth boost, rising from 14.31% YoY in 2021 to 21.35% YoY in 2022, driven by increased demand for e-commerce warehousing and distribution centers. This growth encompassed various transportation facets, reaching a total value of USD 642.60 billion. In 2022, the US Department of Transportation introduced the Port Infrastructure Development Program, allocating more than USD 703 million for 41 projects in 22 states to improve port capabilities, enhance supply chain reliability, and create job opportunities.

For over a year, Russia's invasion of Ukraine disrupted global crude oil and petroleum product markets

In 2022, the global average price of gasoline at the pump was USD 1.22 per liter, a 19% increase from the previous year, exceeding pre-COVID-19 levels. Following the 2021 rebound amid economic recovery, 2022 prices hiked following crude oil increase due to supply disruption risk amid war. Gasoline prices in Europe are the highest compared to

other regions. Gasoline is particularly expensive in Iceland, Norway, Denmark, Greece, Finland, and the Netherlands at USD 7.6 per gallon.

The Brent crude oil price rose significantly in the first half of 2022 but generally declined in the second half of the year. The Brent crude oil spot price averaged USD 100 per barrel in 2022. Total OPEC crude oil production fell from an average of 29.2 million b/d in Q3 2022 to 28.6 million b/d in Q4 2022. In 2023, OPEC crude oil production is expected to average 28.9 million barrels per day. Oil prices have peaked since last November as Russia and Saudi Arabia continue to cut 1.3 million barrels daily from their output, even as global demand rises to near-record levels.

Diesel is produced from crude oil, so prices are closely linked to diesel prices. Diesel prices in the United States and globally increased rapidly in the spring of 2022 because of concerns about global diesel supply. Although crude oil prices declined in the second half of 2022, US diesel futures prices rose again in October 2022 to USD 3.95 per gallon due to seasonal demand and diesel supply concerns for Europe. Russia has been Europe's largest supplier of diesel. In 2023, diesel prices declined in Europe and the United States as Europe has been able to replace most of the diesel it would have imported from Russia with imports from other regions.

International Express Service Industry Overview

The International Express Service Market is fairly consolidated, with the top five companies occupying 71.98%. The major players in this market are DHL Group, FedEx, La Poste Group, SF Express (KEX-SF) and United Parcel Service of America, Inc. (UPS) (sorted alphabetically).

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