

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

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## Abstracts

The Italy Courier, Express, and Parcel (CEP) Market size is estimated at 9.35 billion USD in 2024, and is expected to reach 12.01 billion USD by 2030, growing at a CAGR of 4.27% during the forecast period (2024-2030).

Robust consumer shift to e-commerce owing to availability of several choices, convenience, and accessibility majorly driving CEP delivery growth

The domestic and international segments of the Italian CEP market are being driven by robust e-commerce growth and adoption in the country. The e-commerce industry was valued at USD 37.55 billion in 2022. Post Italiane, FedEx, DHL, and UPS are the key players in the Italian CEP market. Post Italiane is the most used by Italians for parcel deliveries. Amazon Logistics is another significant CEP company in Italy, which delivered 209 million packages in 2021. The e-commerce industry is projected to be valued at USD 51.02 billion by 2025. CEP companies, both big and small scale, are capitalizing on the upcoming trends and demand opportunities and making strategic partnerships and investments, leading to significant market growth.

Italy had the third-highest number of parcel deliveries in Europe in 2020, owing to the pandemic. Italy also has the largest percentage of international shipments of any country in Europe. In recent years, shipments and deliveries have increased due to the growing e-commerce industry in the country. The country also experienced increased employment opportunities in the industry. For instance, there were 192.2 thousand employees in the postal services industry as of 2020.

E-commerce users in Italy are projected to reach 55.97 billion by 2027, with the country reaching a 72.4% user penetration by 2027 due to increasing preference for shopping online from domestic and international e-retailers, thereby majorly boosting the courier industry. Consumers in Italy are rapidly shifting toward purchasing products through e-commerce, owing to the availability of several choices, higher convenience, easy accessibility, and lower costs.

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

Mobility and logistics investments soar to USD 298.25 billion for an integrated national transport system

In 2022, the conflict in Ukraine led to a significant drop in freight train traffic between China and Europe, with Italy experiencing a particularly dramatic collapse in transport volume, down by 91.62% compared to 2021, despite the introduction of the new Wuhan-Milan route. On the other hand, Hungary was a notable exception, as it saw a substantial 1,266% increase in cargo volume despite being a secondary player in this transport route. The decline in transportation demand is the main cause of the progressive decline in maritime freight rates for container shipments.

In 2022, the Document of Economy and Finance's (DEF's) Infrastructure, Mobility, and Logistics Annex presented a comprehensive framework outlining plans, reforms, and investments charted and scheduled for the upcoming decade. It allocated nearly EUR 300 billion (USD 320.24 billion) to selected initiatives aligned with strategic plans considering the government's economic strategy and the Sustainable Development Goals.

The mobility and logistics infrastructure projects listed in the Document of Economy and Finance (DEF) in 2022 were valued at a total of EUR 279.4 billion (USD 298.25 billion), showcasing an increase of 8.1%. This funding was targeted for the Integrated National Transport System's completion and safety, as well as in light of the climate crisis and technological advancement. These expenditures included USD 94.55 billion for roads and highways, USD 166.91 billion for railways and urban nodes, USD 11.43 billion for ports, USD 3.62 billion for airports, USD 36.91 billion for rapid mass transit in major cities, and USD 11.43 billion for cycle paths.

Fuel prices surged in Italy after the discount on fuel-related excise duties expired at the end of 2022

Fuel prices in Italy have continued to rise, with petrol and diesel breaking the record. Diesel reached USD 1.804/liter in 2022, up from USD 1.69 in 2021. The average price charged on petrol in self-service mode was EUR 1.862/liter (USD 1.98/liter), with the various brands ranging between EUR 1.855 (USD 1.97 /liter) and EUR 1.874/liter (1.99 USD/liter), and the restoration of excise duties was in effect until March 21, 2022 (+30.5 cents/liter on petrol and diesel and +10.4 cents/liter on LPG). The price of oil has increased to more than USD 100 per barrel. Prices surged mainly due to the speculations deriving from international tensions and after the Russian invasion of Ukraine.

In the first half of 2021, the price of gas rose sharply. This phenomenon affected many countries where the energy demand increased dramatically due to the global energy crisis and the fast post-lockdown economic recovery. The average Italian household's gas supply price increased by 64.8% in 2022 compared to the previous year due to the impact of the Ukraine conflict on family finances.

Higher fuel prices were a key driver that led to inflation in Italy. Inflation levels in the European Union and Italy peaked in late 2022 and have gradually decreased, but energy prices are rising again. In the initial days of 2023, national prices for full-service petrol stood at EUR 1.95 (USD 2.08) per liter and EUR 2.02 (USD 2.15) for diesel. The increase was largely due to the expiration of the discount on fuel excise tax, which was put in place in March 2022 to help combat a surge in fuel prices. The discount initially expired on December 1, 2022, but was extended at a lower rate till the end of 2022, when it expired.

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

The Italy Courier, Express, and Parcel (CEP) Market is fairly consolidated, with the top five companies occupying 68.19%. The major players in this market are DHL Group, FedEx, La Poste Group (including BRT), Poste Italiane and United Parcel Service of America, Inc. (UPS) (sorted alphabetically).

Additional Benefits:

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