

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

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Abstracts

The Pakistan Courier, Express, and Parcel (CEP) Market size is estimated at 2.82 billion USD in 2024, and is expected to reach 3.64 billion USD by 2030, growing at a CAGR of 4.35% during the forecast period (2024-2030).

Shift towards e-commerce and industrial digitization driving the CEP market growth

Domestic and international e-commerce is growing in the country, in turn significantly contributing to the growth of the overall CEP market by generating demand. E-commerce was valued at about USD 5.91 billion in 2022 and is expected to touch about USD 7.28 billion by 2027, owing to the growing adoption of e-commerce shopping and the shift toward online payments. E-commerce users are also expected to reach 70.79 million by 2027, which would largely potentially contribute to further growth of the CEP market.

Since January 2019, Pakistan Post has been able to reduce the number of undeliverable packages, largely international mail, by 68%. This has been done via effective recipient calling for accurate delivery addresses and collaborations with international regulatory agents for international mail. Also, as demand and volume grew during and post-pandemic, major end-user segments of the e-commerce sector drove CEP market growth in 2021. For instance, electronics and media, fashion, personal and household care and Toys, Hobby & DIY mainly generated CEP demand.

To facilitate the shift from cash on delivery to online payment, the State Bank of

Pakistan introduced Raast, an independent digital payment gateway, in 2021 to facilitate people, organizations, and the government to make online payments. This payment system was established specifically for small-value retail payments, which would largely impact CEP market growth from domestic and cross-border e-commerce. Retail delivery, being a significant driver of the CEP market, was valued at USD 94.45 billion in 2021. The CEP value is thus expected to register a CAGR of 4.47% from 2023-2029.

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

Pakistan has an agreement with China for an economic corridor with 56 ambitious projects worth USD 25.5 billion for connectivity and trade

The transport and storage sector contributed 17.33% YoY to the GDP in 2021 due to abolishing government restrictions and increasing international connectivity for trade. However, the sector started to decline again in 2022, registering a - 6.19% YoY growth in GDP contribution due to the Ukraine-Russia war.

Pakistan's economy is dependent on international connections, including a large Pakistani workforce in the Gulf States that travels in and out of the country. Furthermore, there is a growing emphasis on expanding trade with the Central Asian region. "Modernising Transportation Infrastructure and Greater Regional Connectivity" is another goal of Pakistan Vision 2025. Railway cargo has been consistently ignored and has shrunk to about 10% of total transportation. Road transportation is generally preferred over rail transportation because it is faster and more controllable. However, the government should prioritize the development of rail infrastructure capable of transporting at least 25% of total cargo.

The China-Pakistan Economic Corridor (CPEC) is a regional connectivity framework. It improves geographical linkages and has improved all modes of transportation by enhancing understanding through academic, cultural, and regional knowledge and the activity of a higher volume of trade and business flow. The CPEC is part of the Belt and Road Initiative (BRI) and aims to bring Pakistan to the forefront of the global trade route. Under the CPEC program, Pakistan and China launched 56 projects. So far, 26 projects totaling USD 17 billion have been completed, with 30 projects totaling USD 8.5 billion still in the works. Furthermore, the total cost of the 36 CPEC projects is estimated to be USD 28.4 billion.

Increasing oil prices has led to a decrease in demand and decline in sales of fuel by 19% in H1 2023

Diesel and Gasoline experienced the maximum impact of COVID-19 in 2020. Diesel prices declined by -14.46% YoY, and Gasoline prices declined by a negative 10.30% YoY in 2020. However, the price of diesel increased by 31.03% in 2021 due to global oil supplies having been significantly impacted by the sanctions imposed on Russia as a consequence of the Russia-Ukraine conflict, which has contributed to the rise in prices. [1]

Pakistan doesn't have oil reserves and needs to import 80% of its oil demand as crude oil or refined petroleum products. The cost of importing has increased because oil prices have risen globally, including in Pakistan. Oil prices are increasing due to the recovery from the COVID-19 pandemic and flood disasters in 2021 and 2022. This has resulted in higher taxes on petroleum and other products to meet national spending. The Pakistani rupee has rapidly devalued in recent years, and government subsidies on petrol have been abolished, causing petrol prices to reach a record high of PKR 282 on April 2023. Pakistan's economy is being affected by political instability, which is also contributing to the fuel price increases. [2]

In the first half of FY2023, the oil industry experienced an overall decline of 19% compared to the previous year, with residual fuel oil (RFO) sales having the highest decline at 24%. The increase in oil prices has led to a significant reduction in demand for petroleum products globally, especially domestically, where taxes and levies have also increased. It affects the agricultural sector, which is one of the country's main sources of income and provides raw materials for the industry, and rising oil prices will increase electricity costs.

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

The Pakistan Courier, Express, and Parcel (CEP) Market is fairly consolidated, with the top five companies occupying 83.59%. The major players in this market are DHL Group, Dynamic Logistics International, Leopards Courier Services, M&P Courier and TCS Express (sorted alphabetically).

Additional Benefits:

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