

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

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Abstracts

The South Africa Courier, Express, and Parcel (CEP) Market size is estimated at 207.96 million USD in 2024, and is expected to reach 316.28 million USD by 2030, growing at a CAGR of 7.24% during the forecast period (2024-2030).

Digital advancements in the country leading to the demand in the CEP market

E-commerce is the leading contributor to domestic and international CEP demand in South Africa. For instance, online sales in the country increased significantly by 66% from 2019 to 2020 to more than USD 1.8 billion due to the pandemic. Revenue in the e-commerce market is projected to reach USD 6.36 billion in 2023. Revenue is expected to register a CAGR of 11.89% during 2023-2027, resulting in a projected market value of USD 9.97 billion by 2027. The number of users in the e-commerce market is expected to amount to 33.4 million by 2025. User penetration was 45.1% in 2022 and is expected to hit 53.1% by 2025 owing to rising demand.

Cross-border e-commerce is a significant driver for international CEP market growth. For instance, 27% of South African consumers purchased from the United States in 2021. Europe followed this, accounting for 14% of cross-border purchases. Also, before international delivery was suspended, South Africa sent 1.4 tons of CEPs to Australia in 2021.

The digital economy is the main factor influencing e-commerce demand, which helps boost domestic and international demand for the South African CEP market. The

revenue share of the e-commerce toys, hobby, & DIY industry amounted to 19.54% in 2021. This majorly drove demand for courier, express, and parcel markets in the country. Mobile e-commerce is particularly appealing in South Africa because of the country's quick growth of smartphone adoption. Given that mobile spending is anticipated to rise, this presents enormous opportunities for online shops. The internet penetration in South Africa is forecast to amount to 66.8% in 2025. The mobile phone subscriptions per 100 inhabitants in South Africa are forecast to amount to 183 in 2025.

South Africa Courier, Express, and Parcel (CEP) Market Trends

South African e-commerce fuels surge in quality warehousing demand, with USD 46 million revenue forecasted by 2025

The South African transportation and logistics sector showed signs of recovery in 2021, with a 12% YoY growth in its contribution to GDP, driven by factors like the AFCFTA (African Continental Free Trade Agreement), increased demand in the cold chain market, the rise of e-commerce, and expanded transportation and logistics services. In the fourth quarter of 2022, the industry experienced a modest 0.7% growth, contributing 0.1% to the overall economic performance. This growth was particularly noticeable in land transport, air transport, and communication services.

The demand for quality warehousing in Africa skyrocketed due to the rapid proliferation and growth of e-commerce platforms across the continent. This increase in online retail sales is expected to continue, with e-commerce revenue nearly doubling to reach USD 46 million by 2025. The country's supply is expected to increase as developers such as Africa Logistics Properties and Improvon plan to deliver over 400,000 sq. m of speculative space to the market by the end of 2024.

In South Africa, road transport dominates freight transportation, representing about 63% of all freight ton-kilometers. The government focuses on the National Development Plan (NDP), which aims to achieve a 30% investment-to-GDP ratio. Meeting the infrastructure needs outlined in the NDP is projected to cost over ZAR 6 trillion (USD 0.35 trillion) from 2016 to 2040, with energy and transportation accounting for 72% of this expenditure. The government has introduced the National Infrastructure Plan 2050 to address these challenges, prioritizing key areas such as energy, freight transport, water, and digital infrastructure.

Average Brent Crude oil price increased from USD 79.75 to USD 84.78 in September 2023, due to tightening supply resulting from production cuts by Saudi Arabia

South Africa ranked 65th out of 157 countries regarding the most expensive fuel prices per liter. In 2022, the global average price of gasoline was USD 1.44 per liter. In 2022, the petrol price per liter in South Africa was ZAR 23.29 (USD 1.37). South African petrol prices are higher than those of other African countries, except for Zimbabwe. Factors, such as currency exchange rates, contribute to the overall fuel price, while several levies, taxes, and margins are also added to the pump price.

Fuel prices in South Africa rose by 278% from 2002 to 2022. Petrol 95 has grown by 368% since 2008, while diesel 50 ppm has grown by 51%. The wholesale price of 500 ppm diesel is set to rise to ZAR 22.33 (USD 1.31) at the coast and ZAR 23.05 (USD 1.35) inland from September 2023, with 50 ppm increasing to ZAR 22.58 (USD 1.32) and ZAR 23.29 (USD 1.37), respectively.

South Africa's fuel prices are adjusted monthly, updated by international and local factors. International factors include South Africa importing crude oil and finished products at a price set at the international level, including importation costs. The average value for South Africa from May to August was ZAR 22.39 (USD 1.31), with a minimum of ZAR 22.10 (USD 1.30) in July 2023 and a maximum of ZAR 22.98 in May 2023. The average Brent crude oil price increased from USD 79.75 to USD 84.78 in September because of tightening supply resulting from production cuts by Saudi Arabia. Based on current local and international factors, the fuel prices in September 2023 for petrol (both 93 and 95 Octane) increased by 171 cents per liter (USD 1.71), while those of diesel increased by 284 cents (USD 2.84) per liter.

South Africa Courier, Express, and Parcel (CEP) Industry Overview

The South Africa Courier, Express, and Parcel (CEP) Market is moderately consolidated, with the top five companies occupying 58.32%. The major players in this market are Aramex, City Logistics (Pty) Ltd, La Poste Group, MBE Worldwide SpA and United Parcel Service of America, Inc. (UPS) (sorted alphabetically).

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