

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

<https://marketpublishers.com/r/SF8A14E0AFBBEN.html>

Date: July 2024

Pages: 325

Price: US\$ 4,750.00 (Single User License)

ID: SF8A14E0AFBBEN

Abstracts

The South America Courier, Express, and Parcel (CEP) Market size is estimated at 7.74 billion USD in 2024, and is expected to reach 10.92 billion USD by 2030, growing at a CAGR of 5.92% during the forecast period (2024-2030).

The B2C e-commerce segment is leading the market with respect to CEP demand

B2C e-commerce is one of the industries generating the highest demand in the South American CEP market. Although B2C e-commerce in Latin America had a slow start, it has achieved a penetration rate of over 50% in multiple countries in the region. Brazil ranked the highest in total e-commerce sales across South America in 2021.

MercadoLibre, an online marketplace headquartered in Argentina, dominates the South American B2C e-commerce market and accounted for more than two-thirds of the Argentine e-commerce market in 2022, with its retail e-commerce sales reaching over USD 12 billion. With e-commerce projected to reach USD 96.87 billion by 2027, the South American CEP market is expected to grow significantly.

CEP market in Brazil is growing owing to rising e-commerce. The growth in cross-border trade in Brazil is being driven by the rising number of orders, which recorded a 15% YoY growth in 2022. In alignment, Cainiao, a logistics company of Alibaba expanded in the Brazilian CEP market in 2022. The company launched its first parcel distribution center in Brazil, a major addition to its regional network of sorting centers. The company aims to utilize and expand infrastructure for intra-city and cross-border logistics services and grocery deliveries. The company currently operates 8 weekly

chartered flights between China and Brazil and plans to add more air and sea routes between the countries.

E-commerce growth is expected to majorly boost the CEP market in the region. The e-commerce user penetration is projected to reach 56.5% in 2023 due to rising domestic and cross-border e-commerce in the region. South America is further expected to have 258.10 million e-commerce users by 2027, amounting to a 61.4% user penetration.

Expansion of parcel distribution centres, low-cost air cargo service, among drivers of regional market demand

The CEP market in the region is driven mainly by a surge in e-commerce-led parcel shipments along with demand from other end users such as manufacturing, BFSI sector among others. Brazil, Chile, Argentina, along with other countries, comprise the CEP market in the region. In Brazil, Magazine Luiza, Casabahia, and Americanas accounted for 36.5% of Brazil's top 100 online stores' revenue, which drove domestic CEP demand in 2022. In Argentina, Mercado Libre has almost 27 million online consumers. By 2025, buyer penetration is expected to touch approximately 62%, significantly impacting domestic CEP demand during the forecast period.

E-commerce user penetration in Brazil is projected to touch 66.7% by 2027. Cross-border e-commerce demand is thus pushing companies to expand CEP services. For instance, Cainiao, a logistics company of Alibaba, expanded into the CEP market in 2022. In 2022, the company launched its first parcel distribution center in Brazil, a significant addition to its regional sorting center network.

One of the major demand generators for the courier express and parcel market is B2C e-commerce. Although B2C e-commerce in Latin America had a slow start, it has a penetration rate of over 50% in multiple regional countries. Brazil ranked the highest in e-commerce sales in 2021, followed by Mexico, Colombia, and Argentina.

MercadoLibre, an online marketplace headquartered in Argentina, dominated the B2C e-commerce segment in Latin America by being the top seller in several countries, including Argentina, Mexico, and Chile, and accounted for more than two-thirds of Argentina's e-commerce segment in 2022.

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

South America is offering an investment of USD 4.5 trillion in infrastructure to improve the transportation sector

Chile's transport and storage sector showed steady growth in 2021, with a 24.41% increase in its contribution to GDP. In 2022, transportation, driven by maritime services, expanded by 27.9% due to improved infrastructure and storage demand. Argentina's transportation sector rebounded by 10.62% in 2021 but experienced a Q1 2023 drop in GDP to ARS 52,590.67 million (USD 297.543 million) from Q4 2022's ARS 53,539.95 million (USD 302.914 million), attributed to reduced transport usage, increased private vehicle reliance, and traffic congestion. Brazil's transportation industry encompasses cargo, ports, public transit, and urban mobility, with logistics being costlier at 12% of GDP due to inadequate infrastructure compared to the United States.

Chile's Public Works Ministry (MOP) announced a USD 4.7 billion concession plan in 2021, under which highway projects were said to cost approximately USD 11 billion over the next five years, while other notable projects included hospitals, airports, cable cars, trams, and re-tenders for groups of jails. According to the government, the 2021–2025 five-year plan includes various processes for concessions and tenders. For instance, the value of roadwork projects alone exceeds USD 11 billion.

South America presents investment opportunities of USD 4.5 trillion over the next decade, with 22 initiatives in transportation and telecommunications amounting to USD 117.8 billion. The regional infrastructure integration plan includes 409 transportation, telecommunications, and energy projects, totaling USD 150.4 billion. By 2040, ports and airports are anticipated to necessitate investments of USD 55 billion and USD 53 billion, respectively.

Crude oil prices in the region rose to USD 100 per barrel in 2022 owing to the impact of the Russia-Ukraine War on global crude oil

Colombia is Latin America's third-largest oil producer, followed by Brazil and Mexico. Colombia supplied 203,000 barrels per day on average (2.4% of total US crude oil imports) in 2021. South America pumped 442,789 barrels per day on average in 2022, which was 13% lower than in 2021. Brazil has the region's second-largest oil reserves, accounting for a volume of 12.7 billion barrels. In 2022, Latin America's largest oil producer pumped slightly more than 3 million barrels per day, witnessing a 5.6% increase from 2021.

In 2021, the price of diesel declined by 27.26% YoY, and the price of gasoline declined by 9.85% YoY. The main factor leading to fluctuations in diesel prices is the international demand for distillate fuel. However, Argentina's diesel oil and liquified gas shortages are affecting the mobility of private cars, passenger and cargo transportation, and economic activities. Due to sanctions against Russia, there has been an impact on the price of fuels. The price of oil in the region rose to USD 100 per barrel in 2022, compared to USD 68 in 2021. Argentina's state-owned oil company purchased diesel from the spot market due to extremely high demand and the national government's electricity and gas subsidies.

As of March 2022, the diesel prices in Belize and Barbados were among the highest reported in Latin America and the Caribbean, averaging above USD 1.7 per liter. Within South America, Brazil had the highest diesel price, at USD 1.38 per liter, while Venezuela reported the lowest, with a liter of fuel costing an average of USD 0.03. As of June 2023, Uruguay reported the highest gasoline prices in Latin America and the Caribbean, with an average price of 1.83 USD per liter, followed by Chile with USD 1.58 per liter.

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

The South America Courier, Express, and Parcel (CEP) Market is fairly consolidated, with the top five companies occupying 70.19%. The major players in this market are Correo Argentino, DSV A/S (De Sammensluttede Vognmand af Air and Sea), Empresa Brasileira de Correios e Telegrafos, FedEx and United Parcel Service of America, Inc. (UPS) (sorted alphabetically).

Additional Benefits:

The market estimate (ME) sheet in Excel format

3 months of analyst support

Contents

1 EXECUTIVE SUMMARY & KEY FINDINGS

2 REPORT OFFERS

3 INTRODUCTION

3.1 Study Assumptions & Market Definition

3.2 Scope of the Study?

3.3 Research Methodology

4 KEY INDUSTRY TRENDS

4.1 Demographics

4.2 GDP Distribution By Economic Activity

4.3 GDP Growth By Economic Activity

4.4 Inflation

4.5 Economic Performance And Profile

4.5.1 Trends in E-Commerce Industry

4.5.2 Trends in Manufacturing Industry

4.6 Transport And Storage Sector GDP

4.7 Export Trends

4.8 Import Trends

4.9 Fuel Price

4.10 Logistics Performance

4.11 Infrastructure

4.12 Regulatory Framework

4.12.1 Argentina

4.12.2 Brazil

4.12.3 Chile

4.13 Value Chain & Distribution Channel Analysis

5 MARKET SEGMENTATION (INCLUDES MARKET VALUE IN USD, FORECASTS UP TO 2030 AND ANALYSIS OF GROWTH PROSPECTS)

5.1 Destination

5.1.1 Domestic

5.1.2 International

5.2 Speed Of Delivery

5.2.1 Express

5.2.2 Non-Express

5.3 Model

5.3.1 Business-to-Business (B2B)

5.3.2 Business-to-Consumer (B2C)

5.3.3 Consumer-to-Consumer (C2C)

5.4 Shipment Weight

5.4.1 Heavy Weight Shipments

5.4.2 Light Weight Shipments

5.4.3 Medium Weight Shipments

5.5 Mode Of Transport

5.5.1 Air

5.5.2 Road

5.5.3 Others

5.6 End User Industry

5.6.1 E-Commerce

5.6.2 Financial Services (BFSI)

5.6.3 Healthcare

5.6.4 Manufacturing

5.6.5 Primary Industry

5.6.6 Wholesale and Retail Trade (Offline)

5.6.7 Others

5.7 Country

5.7.1 Argentina

5.7.2 Brazil

5.7.3 Chile

5.7.4 Rest of South America

6 COMPETITIVE LANDSCAPE

6.1 Key Strategic Moves

6.2 Market Share Analysis

6.3 Company Landscape

6.4 Company Profiles

6.4.1 Aramex

6.4.2 Chilexpress

6.4.3 Correo Argentino

6.4.4 Correos de Chile

6.4.5 DHL Group

6.4.6 DSV A/S (De Sammensluttede Vognmænd af Air and Sea)

6.4.7 Empresa Brasileira de Correios e Telegrafos

6.4.8 FedEx

6.4.9 La Poste Group

6.4.10 United Parcel Service of America, Inc. (UPS)

7 KEY STRATEGIC QUESTIONS FOR CEP CEOS

8 APPENDIX

8.1 Global Overview

8.1.1 Overview

8.1.2 Porter's Five Forces Framework

8.1.3 Global Value Chain Analysis

8.1.4 Market Dynamics (DROs)

8.1.5 Technological Advancements

8.2 Sources & References

8.3 List of Tables & Figures

8.4 Primary Insights

8.5 Data Pack

8.6 Glossary of Terms

I would like to order

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

Product link: <https://marketpublishers.com/r/SF8A14E0AFBBEN.html>

Price: US\$ 4,750.00 (Single User License / Electronic Delivery)

If you want to order Corporate License or Hard Copy, please, contact our Customer Service:

info@marketpublishers.com

Payment

To pay by Credit Card (Visa, MasterCard, American Express, PayPal), please, click button on product page <https://marketpublishers.com/r/SF8A14E0AFBBEN.html>

To pay by Wire Transfer, please, fill in your contact details in the form below:

First name:
Last name:
Email:
Company:
Address:
City:
Zip code:
Country:
Tel:
Fax:
Your message:

****All fields are required**

Customer signature _____

Please, note that by ordering from marketpublishers.com you are agreeing to our Terms & Conditions at <https://marketpublishers.com/docs/terms.html>

To place an order via fax simply print this form, fill in the information below and fax the completed form to +44 20 7900 3970

