

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

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Abstracts

The Spain Courier, Express, and Parcel (CEP) Market size is estimated at 4.20 billion USD in 2024, and is expected to reach 5.30 billion USD by 2030, growing at a CAGR of 3.92% during the forecast period (2024-2030).

Positive growth is expected in CEP markets owing to e-commerce boom and increasing internet retail purchases

The expanding e-commerce industry and the nation's strengthening economy contributed to the growth of the CEP market during the pandemic. The majority of CEP shipments in 2020, which were about 64.19% of all CEP shipments, were domestic. Also, almost 54% of all CEP shipments in Spain were small parcels weighing under 2 kg. Also, post-pandemic, with the economy restored, the domestic CEP market value witnessed steady growth of 4.87% YoY in 2022. The domestic CEP value is expected to register a CAGR of 4.01% during 2023-2029, owing to increasing demand for e-commerce.

Various product category purchases via e-commerce have significantly driven the growth of domestic and international CEP markets in 2021 in Spain. For instance, the most popular product category for e-commerce orders in 2021 was home products (67%). This was followed by electronics (65%), fashion items (57%), and books and movies (55%). Also, MRV had the most franchises, followed by GLS and Nacex. Around 820 franchisees of these three businesses operated in Spain's parcel delivery sector in 2021.

Growing internet retail has acted as a driver for transaction volumes and a catalyst for innovation, leading to the establishment of parcel shops and parcel lockers at pickup and dropoff locations, the ability to change delivery schedules, set time slots, a broader range of communication methods, and more. Due to this, in 2020, CEP export shipments made up 11.2% of total exports, while imports made up 15.5% of total shipments. Owing to these factors, the international CEP market volume is projected to register a CAGR of 4.24% during 2023-2029.

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

Transport and logistics sector dominates 4.6% of Spain's GDP, fueled by USD 25.83 billion in infrastructure investments

In 2021, the transport and storage sector witnessed one of the best-recorded growth rates within the economy, only surpassed by wholesale trade and intermediaries (19.2%) and the hotel industry (34.8%). All service activities have raised their indicators, which has allowed the turnover of the sector to increase, as a whole, by 15.5%. In 2022, the transport and logistics industry accounted for 4.6% of Spain's GDP, expected to rise to 10% if the logistics operations of industrial, commercial, and service firms were included. Almost one million jobs are created by this industry, which has a current turnover of EUR 111 billion (USD 118.491 billion) and a high business concentration of about 197,000 companies.

Spain boosts a robust transportation and storage infrastructure, facilitating the efficient movement of goods and people domestically and internationally. From January to June 2023, Spain's exports recorded an expansion of 4.7% compared to the same period in 2022, amounting to Euro 199.95 billion (USD 213.45 billion). Conversely, imports experienced a decline of 2.9% YoY, totaling Euro 216.38 billion (USD 230.98 billion).

The government develops, maintains, and renews railway infrastructure and establishes the financial framework and priorities for action on the railway network to meet future mobility needs, system sustainability, and achieve a single European railway area. The Spanish government also has plans to mobilize EUR 24.2 billion (USD 25.83 billion) in investments between 2021 and 2026 to draw the first step of railway planning to constitute a coherent and effective system that incorporates social, environmental, and economic efficiency.

Owing to high fuel prices, a discount of USD 0.2 per liter was applied to the retail price as a subsidy by the Spanish government in 2022

In Spain, gasoline and diesel costs are still significantly higher than before the Russian invasion of Ukraine. Due to the Russian invasion of Ukraine, the price of gasoline increased by 6.36% and diesel by 22.37% in 2022. From April 2022 to December 2022, the Spanish government subsidized fuel prices. A discount of 20 cents (USD 0.2) per liter was applied to the retail price. In August 2022, petrol and diesel prices were still below the EUR 2 (USD 2.13) per liter threshold. During May-August 2023, gasoline prices in Spain remained unchanged at USD 1.87 per liter. The broader fuel and energy market suffered price shocks and rising costs have been passed down to consumers.

Gasoline and diesel prices skyrocketed throughout Europe due to the increased demand for oil in 2021. The price of a barrel of Brent, a reference in the European Union, increased by 53% in 2021, leading fuels to record highs in European countries. Among European countries, fuel prices in Spain grew substantially, and gasoline and diesel prices increased by 26.2% and 27.6% in 2021, respectively, above the EU average in neighboring countries, such as France, Holland, Italy, and Portugal.

The EU Oil Bulletin certified that a liter of gasoline in Spain was sold at an average price of USD 1.71 and diesel at USD 1.56 in the second week of November 2021. The increase of 26.2% for gasoline and 27.6% for diesel in 2021 was higher than those registered in France, Italy, and Portugal. Since February 2022, Spain has experienced the highest oil prices among the major Eurozone economies. In the case of gasoline, only five of the nine countries (Slovenia, Malta, Cyprus, Lithuania, and Austria) have lower rates than Spain.

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

The Spain Courier, Express, and Parcel (CEP) Market is moderately consolidated, with the top five companies occupying 51.43%. The major players in this market are Correos Express, DHL Group, FedEx, La Poste Group (including SEUR) and United Parcel Service of America, Inc. (UPS) (sorted alphabetically).

Additional Benefits:

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