

Australia Courier, Express, and Parcel (CEP) - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts 2020 - 2029

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Report description:

The Australia Courier, Express, and Parcel Market size is estimated at USD 10.07 billion in 2024, and is expected to reach USD 14.47 billion by 2029, growing at a CAGR of 7.5% during the forecast period (2024-2029).

Key Highlights

- Australia represents a significant growth opportunity for the CEP market, owing to an increase in online purchases, a willingness to embrace innovation, established trading ties with Asia and South East Asia, and a relatively stable economy. This is despite rising oil prices, supply chain disruptions, and the challenge of rapidly scaling up to meet demand. The dominating industry players in the coming years will be those who can digitize their operations outside of physical deliveries; pivot quickly to respond to external economic, supply chain, and environmental changes; and disrupt the traditional delivery model to provide an enhanced customer experience. The increasing supply of goods directly to customers from the manufacturing, retail and healthcare sectors and via cross-border trade is driving these industries to contribute significantly to Australia's CEP Market.
- According to a report released by Australia Post, a record 9.3 million households shopped online in the fiscal year ending June 30, 2022, representing a 200,000 increase from 2021. Meanwhile, online purchases increased by nearly 12%. Every month of the year, an average of 5.6 million households bought something online, 1.5 million more than two years ago, a trend that was especially noticeable between July and December 2021.
- The Australian government Budget for 2022-23 is being allocated to support the government's pro-free trade agenda, increase the global competitiveness of Australian exports, and improves access to global supply chains. This includes USD 187.1 million to lay the groundwork for Australia's world-class cross-border trade system, including a 'tell us once' trade system. A further USD 100 million will be allocated to expand the Export Market Development Grants (EMDG) program, which will provide financial assistance to existing regional and rural small to medium-sized exporters. The government is also putting into effect the recently signed Australia-UK Free Trade Agreement, which will cost USD 171.7 million over four years, 2022-2026.

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Australia Courier, Express & Parcel (CEP) Market Trends

Growth of E-commerce in Australia

According to the International Trade Administration, Australia has the world's 11th largest e-commerce market, with revenue expected to reach USD 32.3 billion in 2023. Ecommerce is expected to reach USD 27.8 billion in 2022, with an annual growth rate of about 16%. According to the International Trade Administration, the traditional retail market is growing at a rate of about 3.4%. Domestic purchases account for 89% of all e-commerce purchases in Australia. With over 13 million active Facebook users in Australia, social media is a significant driver of B2C transaction promotion. Credit and debit cards account for 40% of online payments, and mobile phones account for more than a quarter (26.4%) of all e-commerce transactions in Australia.

Furthermore, eBay is Australia's largest e-commerce platform. It receives 69 million monthly visits in Australia, which is more than triple the number of monthly visits received by Amazon. According to the US Department of Commerce International Trade Administration, Woolworths received 20.4 million monthly visitors. According to the Australia Post, in 2021, Australians did more online shopping than ever before. For 2021, they spent USD 62.3 billion online, accounting for 19.3% of total retail spending. Spending on online physical goods increased by 23.4% year on year.

Furthermore, 73.1% more purchases were made online in 2021 than two years ago, reflecting a dramatic shift in shopper behaviour, according to the Australia Post. According to the Aurex Group, Australia's data centre market and cloud growth have also accelerated significantly over the years. As a result, to meet increased demand, Sydney has remained Australia's central interconnection hub with Amazon Web Services, Microsoft Azure, and Google Cloud.

Increased cross-border trade in Australia

According to the Australian Bureau of Statistics, in 2022, higher commodity export prices resulted in a 4.6% increase in terms of trade, with the index reaching 130.7, the highest level on record. Over the fiscal year 2021-22, annual exports of coal, coke, and briquettes surpassed USD 100 billion for the first time. Following the reopening of Australia's international border earlier in 2022, the recovery of travel services also contributed to the increase in exports.

Despite ongoing geopolitical concerns, two-way commerce between Australia and China continues to prosper. China remains Australia's top business partner. Outbound trade and investment prospects for Australian firms continue to exist in healthcare, technology, food and beverage, agriculture, innovation, and renewable energy. High-end manufacturing, healthcare, education, agribusiness, tourism, and hospitality continue to be important industries for inbound prospects from China. As with other domains of technology and innovation, there are chances for Australian firms to collaborate and play a part in China's emergence as an AI powerhouse. Cross-border partnerships in AI papers between Australia and China have expanded quickly in the last decade, indicating a strong desire by Chinese academics to collaborate with Australian colleagues with AI competence.

Australia's balance on goods and services was a surplus of USD 155,730m in the 2022 calendar year. Australia's trade surplus increased unexpectedly through May 2023, as gains in petroleum exports helped offset declines in major iron ore and metal exports. The country's trade balance increased to AUD 11.79 billion (USD 7.64 billion) in May 2023, above estimates of AUD 10.50 billion (USD 6.80 billion) and coming in slightly higher than April's surplus of AUD 11.16 billion (USD 7.23 billion), according to Australian Bureau of Statistics statistics. Australia's trade surplus has also improved from a nine-month low, owing primarily to higher exports of petroleum and manufactured products. However, the country's crucial iron ore and metal exports fell in May compared to the previous month, owing to weakening demand in major market China.

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Australia's courier, express, and parcel (CEP) market is highly competitive and partially fragmented, with the presence of major international players, like FedEx, DHL, and UPS, and regional players, like Courier Please and Australian Postal Corporation. Some of the local players are Qantas, MRL Global, BHF Couriers, Sendle, Zoom2u Pty Ltd, FRF Couriers, Mail Plus Pty Ltd, Deliveroo, etc.

Most of the players are developing a competitive edge through the infusion of technology in their systems, like the use of drones and WMS systems, and many more. The advancements in technology are expected to create a difference among the services provided especially by the major players consolidating a significant share of the market.

Additional Benefits:

- The market estimate (ME) sheet in Excel format
- 3 months of analyst support

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