

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

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Report description:

The Italy Courier, Express, and Parcel Market size is estimated at USD 10.41 billion in 2024, and is expected to reach USD 15.63 billion by 2029, growing at a CAGR of 8.46% during the forecast period (2024-2029).

The market is driven by the growth in e-commerce, especially the boom in e-retail fuelled by the pandemic situation. Furthermore, increasing parcel volume throughout the country is also propelling the market growth.

Key Highlights

- Italy's economy is one of the largest in the European Union. Its economy is largely service and manufacturing-based. Over three-quarters of the overall GDP is generated by the services sector, which employs roughly 65% of the country's workers. The service industry is primarily supported by wholesale, retail sales, e-commerce sales, and transportation. In terms of absolute value, Italy is the first beneficiary of the two main NGEU (Next Generation European Union Plan) instruments, the Recovery, Resilience Facility (RRF), and the Recovery Assistance for Cohesion and European Territories (REACT-EU). The sole RRF allots USD 194.38 billion in resources between 2021 and 2026, with 69.94 billion in non-refundable grants. Italy also plans to fully utilize its funding capability through the RRF loans, which are expected to be worth USD 124.44 billion.
- The limited mobility of the community has created an opportunity for courier and logistics companies in the country. Mobility constraints, as well as consumers' desire to avoid as much human contact as possible, have increased overall online shopping. Because online grocery shopping is still uncommon in Italy compared to other European markets, the sudden increase in demand has put a strain on the ability of local e-commerce platforms to fulfil orders. This market has experienced tremendous growth even during the pandemic as the internet retail sector experienced a boom. With increasing internet penetration in Italy and social distancing norms, the population prefers to order online, and even food delivery services have experienced a growth in demand.
- A key factor driving the growth of the market studied has been the growth of internet retail. This has acted both as a driver of

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volumes and innovations, such as defined timeslots, the ability to make changes to deliveries, a broader range of communication methods, and the establishment of parcel shops and parcel lockers as pick-up/drop-off locations. Italy is among the top three countries with the highest estimated holiday spending, together with the United Kingdom and Spain. With e-commerce growing during the pandemic, the sector suffered a minimum impact compared to other sectors. The share of the population aged six years and older using the internet in Italy exceeded 74.3% in 2021, increasing twofold since 2006. Moreover, e-commerce users in Italy were approximately 35 million in 2021 and are expected to reach 40 million by 2027.

-As per the industry report, in 2021, the revenue of the e-commerce sector in Italy hit USD 64.93 billion, an unprecedented increase from a year earlier, when it amounted to roughly USD 48.70 billion. While parcel volumes keep rising, carriers have been racing to keep up with competition and consumer demand, delivering innovative new customer experiences, digitalizing technologies, and investing in infrastructure, all while generating sustainable revenues. With the growing parcel delivery market, many start-ups have entered the market studied in the past few years. Many companies have been using automation and blockchain technologies to streamline their supply chain and delivery process.

-While parcel volumes keep rising, carriers have been racing to keep up with competition and consumer demand, delivering innovative new customer experiences, digitalizing technologies, and investing in infrastructure, all while generating sustainable revenues. With the growing parcel delivery market, many start-ups have entered the market studied in the past few years. Many companies have been using automation and blockchain technologies to streamline their supply chain and delivery process. RFID tracking and delivery time scheduling by customers and some of the newer initiatives in the market. The last-mile parcel delivery growth is another factor for growth in parcel volumes. Due to the increasing partnerships and technological upgrades, customers have experienced faster delivery times, hence, preferring private parcel company delivery services to traditional postal operator delivery services.

Italy Courier, Express & Parcel (CEP) Market Trends

Booming internet retail (E-Commerce) in Italy driving the CEP Market

- Italy is the eleventh-largest market for e-commerce, with a revenue of USD 47.4 billion in 2021, placing it ahead of Russia and behind Indonesia. The Italian e-commerce market grew by 29% in 2021, contributing to the global growth rate of 18%. Global eCommerce sales are anticipated to grow over the coming years, just like they did in Italy. Over the coming years, the global expansion will continue as new markets develop. East and Southeast Asia, with their expanding middle class and lagging offline infrastructure, will be the driving force behind this progress.

- Amazon.it is the dominant participant in the Italian online retail sector. In 2021, the store generated USD 5.9 billion in revenue. Shein.com and zalando.it, with USD 1 billion and USD 801 million, respectively, are the second and third-largest retailers behind amazon.it. The top three stores collectively generate 15% of Italy's online sales. This decline in annual growth reflects a modestly crowded market compared to the 29% Y-o-Y increase between 2020 and 2021. However, the 52% online penetration in Italy-i.e., the proportion of people who will have made at least one online purchase in 2021-is a sign of prospective growth.

- Due to its rapid digitalization and the enthusiasm of its younger consumers to test new online shops, Italy is regarded as the best market for cross-border e-commerce in Europe. Due to this, Italy is a very alluring market for businesses trying to expand. Italians are eager to spend, whether you want to open a business there or sell internationally from your base. A key factor driving the growth of the market studied has been the growth of internet retail. This has acted both as a driver of volumes and also of innovations, such as defined time slots, the ability to make changes to deliveries, a broader range of communication methods, and the establishment of parcel shops and parcel lockers as pick-up/drop-off locations

Developing same-day delivery in Italy driving the market

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- Same-day shipping has the power to alter how customers purchase completely. It combines the ease of online shopping with the promptness of physical stores. In recent years, a growing number of businesses, including established logistics service providers like DHL, DPD, FedEx, and UPS, have begun testing and running innovative same-day delivery models. Due to the consumers' attractive value proposition of same-day delivery, demand is anticipated to rise dramatically.
- Customers favour same-day delivery. In a recent poll done by several industry organizations in Germany, France, Sweden, and the UK, 50% of participants said they would be ready to pay EUR 6-7 (USD 6.39-7.45) for same-day delivery on a EUR 59 (USD 62.80) purchase. Brick-and-mortar stores also have a unique potential to offer same-day delivery on a large scale by fusing their local infrastructure with an e-commerce channel. They might be able to regain customers whose attention is shifting more and more toward online purchasing by using a multichannel strategy.
- Amazon has done well to secure this relationship, as although there is sophisticated last-mile competition in major metro markets, Poste Italiane is the only operator with national coverage. Currently, it is up to Poste Italiane to raise its game and prove that it can be a player in the last mile and not just a bank that delivers some mail on the side. Although there is sophisticated last-mile competition in large metro markets, Poste Italiane is the sole operator with nationwide service, so Amazon did well to acquire this agreement. The possibilities are enormous. Logistics providers must prepare for the impending transition by modifying their current networks

Italy Courier, Express & Parcel (CEP) Industry Overview

The Italy Courier, Express, and Parcel (CEP) Market is fairly fragmented with the presence of a large number of global and regional companies. BRT, DHL, Post Italiane, FedEx, UPS, and GLS are the key players in the Italian CEP market. Post Italiane is the most used by Italians for parcel deliveries. The company has been developed recently. It is partnering with tech companies and implementing them to improve the supply chain. The new trends, like same-day delivery, made companies across Italy apply new strategies and update their supply chains. The growth of the e-commerce market made companies like Amazon extend their warehouse spaces in Italy, along with the technology.

Additional Benefits:

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

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