

## **Brazil Courier, Express, and Parcel (CEP) - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)**

Market Report | 2025-04-28 | 320 pages | Mordor Intelligence

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### **Report description:**

The Brazil Courier, Express, and Parcel (CEP) Market size is estimated at 5.93 billion USD in 2025, and is expected to reach 7.77 billion USD by 2030, growing at a CAGR of 5.56% during the forecast period (2025-2030).

E-commerce is driving the domestic and international CEP demand

- E-commerce user penetration is projected to reach 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 in the CEP market in 2022. The company launched its first parcel distribution center in Brazil, which is a significant 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 was a major driver for domestic and international CEP market growth and demand in the country in 2021. The electronics segment was the most popular e-commerce segment in terms of the total number of orders, followed by fashion, personal and household care, toys, hobby and DIY, and furniture . With e-commerce projected to reach USD 71.68 billion by 2027, the CEP market is expected to grow exponentially.

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## Brazil Courier, Express, and Parcel (CEP) Market Trends

In 2022, Brazil secured USD 47.27 billion in logistics investment and expanded privatization efforts to bridge infrastructure gap

- In January 2024, Brazil received a substantial funding injection of USD 1.7 billion from the New Development Bank, marking a crucial step in the country's efforts toward sustainable development and climate resilience. The initial USD 500 million tranche is designated for the BNDES Climate Program, aimed at reducing greenhouse gas emissions and facilitating climate change adaptation efforts. The remaining USD 1.2 billion will support sustainable infrastructure programs, aiding states and municipalities in transitioning to greener practices.
- In 2023, the Brazilian government allocated USD 2.59 billion to infrastructure logistics, covering highways, railways, ports, and airports, with the majority, about USD 2.42 billion, directed towards highways while railways received a smaller portion of USD 30.25 millions. However, there are plans to unveil a significant national initiative to boost investments in freight rail projects by June 2024, combining both public and private sector funding. The government intends to inject USD 4 billion into these projects.

Diesel prices witnessing a drop in demand due to seasonal variation and economic slowdown in 2024

- In March 2024, Brazil saw a drop in Diesel demand due to seasonal variations and a possible economic slowdown. Petrobras' move to lower Diesel prices and the requirement to increase biodiesel blending from 12% to 14% also contributed to this decline in demand for pure fossil Diesel. Global shifts in crude oil prices and government initiatives to stabilize prices were key factors influencing the domestic market. Despite having an excess of 3.2 million barrels of Russian Diesel, Brazil continued to receive shipments without a complete stop.
- In February 2024, diesel, gasoline, and cooking gas prices rose by around 12.5% due to adjustments of the ICMS state goods and services tax. This increase was decided by the national committee of state finance secretaries in October 2023 and marks the first adjustment of ICMS on fuels since 2022. A law passed previously unified this tax across Brazil and set a minimum period of 1 year before the first rate change, with subsequent revisions permitted every 6 months. The next price adjustment is expected by 2024 year end.

## Brazil Courier, Express, and Parcel (CEP) Industry Overview

The Brazil Courier, Express, and Parcel (CEP) Market is fairly consolidated, with the major five players in this market being Azul - Linhas Aereas Brasileiras (including Azul Cargo Express), DHL Group, Empresa Brasileira de Correios e Telegrafos, FedEx and Total Express (sorted alphabetically).

Additional Benefits:

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

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