

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

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Report description:

The Italy Courier, Express, and Parcel (CEP) Market size is estimated at 9.77 billion USD in 2025, and is expected to reach 12.01 billion USD by 2030, growing at a CAGR of 4.23% during the forecast period (2025-2030).

Robust consumer shift to e-commerce owing to availability of several choices, convenience, and accessibility majorly driving CEP delivery growth

- The domestic and international segments of the Italian CEP market are being driven by robust e-commerce growth and adoption in the country. The e-commerce industry was valued at USD 41.9 billion in 2022. Laposte, Post Italiane, FedEx, DHL, and UPS are the key players in the Italian CEP market. Post Italiane is the most used by Italians for parcel deliveries. Amazon Logistics is another significant CEP company in Italy, which delivered 209 million packages in 2021. The e-commerce industry is projected to be valued at USD 64.8 billion by 2025. CEP companies, both big and small scale, are capitalizing on the upcoming trends and demand opportunities and making strategic partnerships and investments, leading to significant market growth.
- E-commerce users in Italy are projected to reach 42.1 million by 2027, with the country reaching a 72.4% user penetration by 2027 due to increasing preference for shopping online from domestic and international e-retailers, thereby majorly boosting the courier industry. Consumers in Italy are rapidly shifting toward purchasing products through e-commerce, owing to the availability of several choices, higher convenience, easy accessibility, and lower costs.

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

Growing future prospects due to planned overhaul of superheavy cargo transport fleet by 2026 in Italy

- In July 2024, the Italian Ministry of Transport greenlit a project to establish a rail freight station in Piacenza, strategically placed between Milan and Bologna. The upcoming station will be situated in the eastern part of Piacenza, specifically in the Le Mose area. Moreover, Le Mose already hosts the Piacenza Intermodal Terminal, overseen by Hupac. This existing terminal is currently undergoing significant enhancements, with completion slated for late 2024 or early 2025. These developments paint a promising future for Piacenza's rail freight prospects.
- In 2024, Italy plans to upgrade its superheavy cargo transport fleet due to poor conditions and failure to meet EU standards. Shippers and carriers are urging the government to implement a public incentive plan amid challenges from the Russian-Ukrainian conflict and stricter EU regulations. The plan requires a USD 747.24 million investment by 2026 to phase out 25-30% of the oldest, most polluting, and least safe vehicles over three years. Italy's support for the freight sector has lagged behind France and Germany, but changes are expected as early as late 2024.

Fuel prices surged in Italy after the discount on fuel-related excise duties expired at the end of 2022

- For the last three years, Italy has consistently held the record for the highest average wholesale power prices among major European markets. This is primarily due to its heavy reliance on natural gas for electricity generation, a strategy that sets it apart from its European counterparts. In 2023, Italy's wholesale power prices stood at an average of USD 137.80 per megawatt hour, a figure that was a third higher than both Germany's and France's averages, and over 50% more than Spain's. Moving into 2024, Italy's power costs have continued to surge, with recent wholesale prices sitting nearly 40% above France's and a striking 60% higher than Spain's.
- As of March 2024, Italy's power and gas regulator, Arera, has increased the maximum payments in capacity auctions for 2025-2027 to USD 86,466.7/MW for new capacity. Previous auctions for 2022-2024 offered maximum payments of USD 74,724.3/MW for new capacity and USD 35,227.2/MW for existing capacity, payable over 15 years. In coming years, Italian power demand will rise due to increased electrification from electric vehicles, heat pumps, and electrolyzers.

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

The Italy Courier, Express, and Parcel (CEP) Market is fairly consolidated, with the major five players in this market being DHL Group, FedEx, International Distributions Services (including GLS), La Poste Group (including BRT) and Poste Italiane (sorted alphabetically).

Additional Benefits:

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

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