

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

Market Report | 2025-04-28 | 309 pages | Mordor Intelligence

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Report description:

The Philippines Courier, Express, and Parcel (CEP) Market size is estimated at 1.33 billion USD in 2025, and is expected to reach 1.85 billion USD by 2030, growing at a CAGR of 6.89% during the forecast period (2025-2030).

Demand in the domestic and international CEP markets is increasing owing to industry advancements and increasing e-commerce

- In an attempt to speed up mail and parcel deliveries domestically and internationally in the country, the Philippine Postal Corporation (Philpott) eliminated notification cards in 2021. It was a 75-year-old practice causing significant delays in deliveries. Earlier, the mail or parcel recipient had to receive a notification card before a parcel could be picked up at the post office, which would usually take about two to three months in order to be received. This caused delays and thus made door-to-door deliveries inconvenient. Some major domestic courier service providers in Philippines are LBC and 2GO Express, with over 1,000 branches each. The United States was the biggest market for apparel exports for Philippines in 2022. Overall, exports of articles of apparel and clothing accessories amounted to USD 789 million in 2022.
- In October 2023, FedEx expanded its presence in the Philippines, establishing over 1,100 outlets to offer customers more choices for sending their packages. The extensive network of FedEx Authorized Ship Centers (FASC) offers consumers numerous locations where they can drop off their shipments. The network consists of 792 2GO outlets, 335 SM Business Centers, and 25 Alfamart stores, all authorized to accept packages without additional charges.

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

The Philippine GDP rise 7.6% annual growth in 2022, driven by rise in trade warehouse and industrial growth

- In the fourth quarter of 2022, the Philippine GDP increased by 7.2%, leading to a 7.6% annual growth. Wholesale and retail trade, auto and motorcycle repair (8.7%), financial and insurance activities (9.8%), and manufacturing (4.2%) were the main drivers of the growth in the fourth quarter of 2022. The industries that made the most significant contributions to the annual growth for 2022 were manufacturing (5.0%), construction (12.7%), wholesale and retail trade (8.7%), and auto and motorcycle repair.
- Warehousing is the second most significant component of the Philippine logistics market. The most important market contributors are industrial and retail warehousing and e-commerce firms. Manufacturing activities are increasing in the Philippines market. Rising domestic consumption and international trade activities are the primary drivers of warehousing growth in the Philippines. Warehousing in the Philippines has seen an increase in trade flow in recent years, which has boosted demand for transportation and storage facilities. A yearly increase in cumulative cargo throughout the country has also positively impacted the Philippine warehousing industry.

Despite the decline in the Philippine energy sector by 4.8% in 2022, it is poised to grow by 5.5% in 2023

- The Philippine government allocated PHP 2.5 billion (USD 49 million) in fuel subsidies for public transportation drivers in 2022 despite rising oil prices as a result of Russia's attack on Ukraine. The funds would be used for the Department of Transportation's fuel subsidy program, providing vouchers to 377,000 drivers. In 2022, the average retail price of one-liter gas in the Philippines was around 1.55 USD, reflecting a significant increase from the previous year's retail price of 1.04 USD.
- During 2022-2031, the demand for oil in the Philippines is expected to increase by 3.4%, and net imports are estimated to increase by around 3.5%. The energy sector in the Philippines declined by 4.8% in 2022, but it is expected to grow by 5.5% in 2023. However, there are supply limitations, and the sector needs to shift toward green energy. As the population grows and the domestic gas supply decreases, the country is expected to rely heavily on imported fuel, leading to a power shortage from 2024 to 2025.

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

The Philippines Courier, Express, and Parcel (CEP) Market is fairly consolidated, with the major five players in this market being DHL Group, J&T Express, Lalamove, LBC Express Holdings, Inc. and SM Investments Corporation (including 2GO) (sorted alphabetically).

Additional Benefits:

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

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