

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

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### **Report description:**

The South Africa Courier, Express, and Parcel (CEP) Market size is estimated at 223.6 million USD in 2025, and is expected to reach 316.3 million USD by 2030, growing at a CAGR of 7.18% during the forecast period (2025-2030).

Digital advancements facilitating CEP sector demand in South Africa

- E-commerce is the leading contributor for domestic and international CEP demand in South Africa. For instance, online sales in the country increased significantly by 66% from 2019 to 2020 to more than USD 1.8 billion due to the pandemic. Revenue in the e-commerce market is projected to reach USD 6.36 billion in 2023. Revenue is expected to grow at a CAGR of 11.89% from 2023-2027, resulting in a projected market value of USD 9.97 billion by 2027. In the e-commerce market, the number of users is expected to amount to 33.4 million users by 2025. User penetration was 45.1% in 2022 and is expected to hit 53.1% by 2025 owing to rising demand.
- Digital economy is the main factor influencing ecommerce demands which in turn helps boost both domestic and international demand for courier, express and parcel market. The revenue share of e-commerce-Toys, Hobby & DIY amounted to 21.4% in 2021. This majorly drove demand for courier, express, parcel market in the country. Mobile e-commerce is particularly appealing in South Africa because of the country's quick growth of smart phones adoption. Given that it is anticipated that mobile spending will rise, this presents enormous opportunities for online shops. The internet penetration in South Africa is forecasted to amount to 66.8% in 2025. The mobile phone subscriptions per 100 inhabitants in South Africa are forecasted to amount to 183 in 2025.

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## South Africa Courier, Express, and Parcel (CEP) Market Trends

Rising government initiatives witnessed focused on improvement of transport infrastructure helping reduce recession conditions

- As of March 2024, Namibia and South Africa are planning infrastructure projects worth ZAR 7 billion (USD 411.9 million) over the next three years to address rail and port inefficiencies. Namibia's Ministry of Finance is starting with ZAR 2 billion (USD 117.69 million) in 2024 for projects linking the two countries and other parts of Southern Africa. South Africa's economy narrowly avoided a recession in 2023 due to transport bottlenecks and power shortages, prompting the government to involve the private sector to improve port and rail efficiency.
- In South Africa, road transport dominates freight transportation. The government focuses on the National Development Plan (NDP), which aims to achieve a 30% investment-to-GDP ratio. Meeting the infrastructure needs outlined in the NDP is projected to cost over ZAR 6 trillion (USD 0.35 trillion) from 2016 to 2040, with energy and transportation accounting for 72% of this expenditure. The government has introduced the National Infrastructure Plan 2050 to address these challenges, prioritizing key areas such as energy, freight transport, water, and digital infrastructure.

Average Brent Crude oil price increased from USD 79.75 to USD 84.78 in September 2023, due to tightening supply resulting from production cuts by Saudi Arabia

- Fuel prices are expected to drop again in September 2024, with the latest data showing a strong over-recovery for both petrol and diesel. The Central Energy Fund (CEF) suggests petrol prices may decrease by 65 cents (93 Unleaded) and 70 cents (95 Unleaded), while diesel could fall by 53 cents (500ppm) and 50 cents (500ppm). These cuts might bring petrol prices just below January 2024 levels, with 95 Unleaded at around ZAR 21.62 (USD 1.27) on the coast and ZAR 22.41 (USD 1.31) inland, and 93 Unleaded at about ZAR 22.06 (USD 1.29).
- The IMF projects South Africa's GDP growth at 1% for 2024, lower than the 4% forecast for other emerging markets. Growth is expected to improve to 1.4% in 2025 and 2026 as load-shedding decreases and new power capacity comes online. The SARB offers a slightly higher forecast of 1.2% for 2024 and 1.5% for 2025 and 2026. Both the IMF and SARB see potential for interest rate cuts in late 2024 as inflation eases, which could boost consumption.

## South Africa Courier, Express, and Parcel (CEP) Industry Overview

The South Africa Courier, Express, and Parcel (CEP) Market is fairly consolidated, with the major five players in this market being Aramex, City Logistics (Pty) Ltd., La Poste Group, MBE Worldwide SpA and United Parcel Service of America, Inc. (UPS) (sorted alphabetically).

Additional Benefits:

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

### **Table of Contents:**

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## 1 EXECUTIVE SUMMARY & KEY FINDINGS

## 2 REPORT OFFERS

## 3 INTRODUCTION

### 3.1 Study Assumptions & Market Definition

### 3.2 Scope of the Study?

### 3.3 Research Methodology

## 4 KEY INDUSTRY TRENDS

### 4.1 Demographics

### 4.2 GDP Distribution By Economic Activity

### 4.3 GDP Growth By Economic Activity

### 4.4 Inflation

### 4.5 Economic Performance And Profile

#### 4.5.1 Trends in E-Commerce Industry

#### 4.5.2 Trends in Manufacturing Industry

### 4.6 Transport And Storage Sector GDP

### 4.7 Export Trends

### 4.8 Import Trends

### 4.9 Fuel Price

### 4.10 Logistics Performance

### 4.11 Infrastructure

### 4.12 Regulatory Framework

#### 4.12.1 South Africa

### 4.13 Value Chain & Distribution Channel Analysis

## 5 MARKET SEGMENTATION (includes Market Value in USD, Forecasts up to 2030 and analysis of growth prospects)

### 5.1 Destination

#### 5.1.1 Domestic

#### 5.1.2 International

### 5.2 Speed Of Delivery

#### 5.2.1 Express

#### 5.2.2 Non-Express

### 5.3 Model

#### 5.3.1 Business-to-Business (B2B)

#### 5.3.2 Business-to-Consumer (B2C)

#### 5.3.3 Consumer-to-Consumer (C2C)

### 5.4 Shipment Weight

#### 5.4.1 Heavy Weight Shipments

#### 5.4.2 Light Weight Shipments

#### 5.4.3 Medium Weight Shipments

### 5.5 Mode Of Transport

#### 5.5.1 Air

#### 5.5.2 Road

#### 5.5.3 Others

### 5.6 End User Industry

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- 5.6.1 E-Commerce
- 5.6.2 Financial Services (BFSI)
- 5.6.3 Healthcare
- 5.6.4 Manufacturing
- 5.6.5 Primary Industry
- 5.6.6 Wholesale and Retail Trade (Offline)
- 5.6.7 Others

## 6 COMPETITIVE LANDSCAPE

- 6.1 Key Strategic Moves
- 6.2 Market Share Analysis
- 6.3 Company Landscape
- 6.4 Company Profiles
  - 6.4.1 Aerospeed Couriers
  - 6.4.2 Aramex
  - 6.4.3 City Logistics (Pty) Ltd.
  - 6.4.4 D2D Couriers
  - 6.4.5 DHL Group
  - 6.4.6 First Freight Couriers (Pty) Ltd.
  - 6.4.7 La Poste Group
  - 6.4.8 MBE Worldwide SpA
  - 6.4.9 RAM Hand-to-Hand Couriers
  - 6.4.10 The Courier Guy
  - 6.4.11 United Parcel Service of America, Inc. (UPS)

## 7 KEY STRATEGIC QUESTIONS FOR CEP CEOS

## 8 APPENDIX

- 8.1 Global Overview
  - 8.1.1 Overview
  - 8.1.2 Porter's Five Forces Framework
  - 8.1.3 Global Value Chain Analysis
  - 8.1.4 Market Dynamics (DROs)
  - 8.1.5 Technological Advancements
- 8.2 Sources & References
- 8.3 List of Tables & Figures
- 8.4 Primary Insights
- 8.5 Data Pack
- 8.6 Glossary of Terms

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