

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

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Report description:

The Spain Courier, Express, and Parcel (CEP) Market size is estimated at 4.39 billion USD in 2025, and is expected to reach 5.3 billion USD by 2030, growing at a CAGR of 3.83% during the forecast period (2025-2030).

Positive growth is expected in CEP markets owing to e-commerce boom and increasing internet retail purchases

- In Spain, there were 21,992 postal and courier activity companies in 2022. The number of employment opportunities has significantly increased along with the expanding businesses in operation and trade volumes. As a result, in 2022, 85,992 employees worked in the Spanish postal and courier activities sector. Also, Spain was fifth out of 25 EU countries in terms of revenue for its postal and courier activities. In alignment, DHL, opened a new parcel classification system in its warehouse in Madrid in 2023 which can process 25,000 packages/hour. It functions as an international hub and centralizes merchandise movements with the Canary Islands.
- In February 2024, UPS inaugurated its latest package sorting and delivery center in Zaragoza, Spain, further enhancing its domestic network within the country. Spanning over 4,000 sqm, the new facility has advanced processing technology enabling it to handle 3,000 packages per hour, marking a 30% increase from its predecessor. This launch followed several recent investments in Spain, including EUR 40 million (USD 42.69 million) hub in Barcelona covering more than 24,000 sqm, capable of sorting up to 22,000 packages per hour, representing one of UPS's largest commitments to the Spanish market.

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

Developing transport and storage sector fueled by growing infrastructure investments by Spanish Government

- In May 2024, plans to build a rail tunnel under the Strait of Gibraltar to connect Spain and Morocco were revived. The Spanish government hired state-owned engineering firm Ineco to update the feasibility study and cost estimates for the project. Initial estimates suggest the tunnel could cost between USD 5.33 billion and USD 10.67 billion, with funding expected from European and African lending institutions. The shortest route between Spain and Morocco is 14 km, but the sea is about 1000 m deep there, making construction difficult. Alternatives being considered are around 28 km long but at a more manageable depth of less than 300 meters. The current plan is for a single-bore tunnel, with the option to add a second parallel tunnel in the future. This tunnel would be used by both passenger and freight trains.
- In June 2024, Spain allocated USD 2.47 billion to enhance rail infrastructure in northern Spain, part of a broader USD 3.09 billion investment in Asturias. Out of this total, USD 2.35 billion is earmarked for EU projects slated for completion by 2030. Meanwhile, developments overseen by Spain's Ministry of Transport, with a budget of USD 744.95 million, are targeted for a 2050 finish. In October 2024, Spain greenlit a tripartite agreement to construct a new southern rail entrance to the Port of Barcelona, with expenses exceeding USD 805.65 million.

Owing to high fuel prices, a discount of USD 0.2 per liter was applied to the retail price as a subsidy by the Spanish government in 2022

- Spain has witnessed a consistent uptrend in fuel prices, with the average cost of a liter of petrol climbing to USD 1.78 by April 2024, marking a 0.96% increase for three consecutive months, reminiscent of mid-October levels. Diesel prices, on the other hand, stood at USD 1.66 per liter, reflecting an uptick of nearly 0.6% in the fourth week of the month. Moreover, gasoline prices have surged by 9.25% since the start of 2024, while diesel has seen a more modest increase of close to 4.5%.
- Fuel prices have been a major concern recently, along with food costs, significantly impacting Spaniards' budgets. By the end of 2024, the price of a liter of 95-octane gasoline is expected to be around USD 1.49, and diesel around USD 1.38. The main reason for this expected drop in fuel prices is the oil market, which is seeing a decline in both supply and demand. The International Energy Agency predicts that oil consumption will fall sharply, from 2.8 million barrels per day in the third quarter of 2023 to 1.1 million in 2024.

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

The Spain Courier, Express, and Parcel (CEP) Market is moderately consolidated, with the major five players in this market being Correos Express, DHL Group, FedEx, La Poste Group (including SEUR) and Logista (sorted alphabetically).

Additional Benefits:

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

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