Australia Courier, Express, And Parcel (CEP) - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2026 - 2031)

Market Report | 2026-02-09 | 308 pages | Mordor Intelligence

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Report description:

Australia Courier, Express, And Parcel (CEP) Market Analysis

The Australia courier, express, and parcel (CEP) market was valued at USD 11.75 billion in 2025 and estimated to grow from USD 12.33 billion in 2026 to reach USD 15.72 billion by 2031, at a CAGR of 4.97% during the forecast period (2026-2031). Demand stems from sustained e-commerce use, a letter-to-parcel regulatory pivot, and nationwide investment in automated hubs and parcel-locker networks. Express options continue to gain ground as same-day fulfillment becomes a hygiene factor, while carbon-neutral delivery pledges reshape fleet strategies. International volume, led by SME exports to New Zealand, the US, and the UK, grows faster than domestic traffic, but domestic routes still underpin network economics. Digital routing, electric vehicles, and greenfield hubs combine to lift productivity as labor costs and urban congestion tighten cost structures.

Australia Courier, Express, And Parcel (CEP) Market Trends and Insights

Explosive E-Commerce Penetration and Order Frequency

Australia's online retail base now covers 82% of NSW households, and similar penetration levels are emerging in other large states. Subscription boxes, buy-now-pay-later usage, and mobile checkouts together create multiple smaller consignments per shopping cart, pushing parcel counts higher even when unit revenue plateaus. Regional households, faced with limited brick-and-mortar choices, lean heavily on online channels, generating consistent rural parcel flows that smooth the urban peak-season spikes. Cross-border browsing adds incremental volume and demands tighter customs processing, encouraging local

CEP providers to forge overseas hand-off agreements. Repeated positive delivery experiences reinforce buyer confidence, making reliable CEP performance a key flywheel for e-commerce growth.

Regulatory Reform Freeing Australia Post Capacity for Parcels

Revised postal guidelines reduced mandatory letter rounds and unlocked capital for parcel-centric automation. Australia Post is building six regional facilities-each designed for 900-2,200 parcels per day and outfitted with 50 kW rooftop solar arrays and EV charging bays-due between late 2025 and mid-2027. The ACCC's preliminary nod to increase domestic stamp prices helps cross-subsidize parcel infrastructure. Reserved letter volumes are set to fall 10.6% annually through 2027-28, freeing fleet and labor hours for parcel handling, while regulatory flexibility still preserves universal service in remote zones.

Rising Last-Mile Labor and Subcontractor Costs

Driver shortages, higher wage expectations, and regulatory scrutiny of gig-economy contracts are inflating delivery costs across the Australia courier, express, and parcel (CEP) market. Metropolitan housing and fuel price spikes push subcontractor rates upward, while union negotiations for minimum standards may raise baseline remuneration. Operators automate sortation to offset hub labor, yet doorstep delivery remains labor-intensive. Peak-season competition for drivers triggers bidding wars, squeezing margin headroom. Return-shipping fees climbed 30% at Australia Post in 2024, signaling system-wide cost pass-through.

Other drivers and restraints analyzed in the detailed report include:

Rapid Build-Out of Parcel-Locker and PUDO NetworksSME Cross-Border Shipping Growth to NZ, US and UKUrban Congestion and Kerb-Access Restrictions

For complete list of drivers and restraints, kindly check the Table Of Contents.

Segment Analysis

E-commerce absorbed 35.32% of the 2025 value due to broader category penetration and fast-fashion restocking cycles. Healthcare consignments will grow 5.17% CAGR between 2026-2031, spurred by telehealth prescriptions and direct-to-patient cold-chain needs.

Temperature-controlled satchels, data-loggers, and time-in-transit guarantees elevate service complexity and margin potential in healthcare lanes. Meanwhile, grocery and DIY categories migrate online, further thickening the parcel mix and sustaining the demand runway for the Australia courier, express, and parcel (CEP) market.

Domestic consignments hold a 62.21% share of the Australia courier, express, and parcel (CEP) market in 2025, sustained by dense east-coast population clusters that favor short-haul network builds. International parcels, while smaller, will climb 5.11% CAGR between 2026-2031 as SMEs embrace cross-border marketplaces and fintech-enabled payments. This dual-track evolution anchors network stability while injecting higher-yield lanes into the portfolio.

Australia Post's regional parcel hubs boost next-day domestic coverage, whereas international growth pushes providers to scale gateway operations and automated customs clearance. Currency volatility and new de-minimis policies shape lane economics, yet brand-Australia premiums in food and skincare categories soften those swings. The segment therefore balances low-risk internal flows with higher-margin overseas expansion.

The Australia Courier, Express, and Parcel (CEP) Market Report is Segmented by Destination (Domestic and International), Speed of Delivery (Express and Non-Express), Model (Business-To-Business (B2B), and More), Shipment Weight (Heavy Weight, Light Weight, and Medium Weight), Mode of Transport (Air, Road, and Others), and End User Industry (E-Commerce, and More). The Market Forecasts are Provided in Terms of Value (USD).

List of Companies Covered in this Report:

Aramex Australia Post BHF Couriers Express Pty Ltd. DHL Group Direct Couriers Pty Ltd. FedEx Freightways Intelcom Courrier Canada Inc. (including Dragon Fly Shipping) Japan Post Holdings Co., Ltd. Kings Transport Singapore Post Ltd. United Parcel Service (UPS)

Additional Benefits:

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

Table of Contents:

4.15.6 AI-driven Dynamic Routing Solving Driver-Hour Scarcity
4.16 Market Restraints
4.16.1 Rising Last-Mile Labor and Subcontractor Costs
4.16.2 Urban Congestion and Kerb-Access Restrictions
4.16.3 Packaging-Waste Regulations Increasing Compliance Costs
4.16.4 Free-Returns Culture Eroding Parcel Margins
4.17 Technology Innovations in the Market
4.18 Porter's Five Forces Analysis
4.18.1 Threat of New Entrants
4.18.2 Bargaining Power of Buyers
4.18.3 Bargaining Power of Suppliers
4.18.4 Threat of Substitutes
4.18.5 Competitive Rivalry

5 Market Size and Growth Forecasts (Value, USD)
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
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 Market Concentration
6.2 Key Strategic Moves
6.3 Market Share Analysis
6.4 Company Profiles (Includes Global Level Overview, Market Level Overview, Core Segments, Financials as Available, Strategic

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