

Australia Last Mile Delivery - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2026 - 2031)

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Report description:

Australia Last Mile Delivery Market Analysis

The Australia Last Mile Delivery Market is expected to grow from USD 3.9 billion in 2025 to USD 4.19 billion in 2026 and is forecast to reach USD 5.96 billion by 2031 at 7.32% CAGR over 2026-2031.

Heightened e-commerce penetration, regional demand dispersion, and corporate sustainability targets are accelerating investment across networks, vehicles, and automation. Intensifying competition is balanced by steady parcel-volume growth and the emergence of premium time-definite services that command higher yields. Retailers continue to vertically integrate fulfillment, and carriers increasingly deploy artificial intelligence to cut empty miles. Structural challenges remain, including labor-cost inflation, kerb-access restrictions in central business districts, and the slow roll-out of commercial charging infrastructure.

Australia Last Mile Delivery Market Trends and Insights

Accelerated E-commerce Penetration Post-COVID

Households have hard-wired online shopping into everyday routines, lifting digital spending to AUD 69 billion (USD 46.95 billion) in 2024 and pushing Australia Post parcel volumes to 262 million in the first half of 2025. More than 7.6 million households bought online during the November-December peak, and 68% now abandon shopping carts when delivery appears slow. Marketplaces

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such as Amazon and eBay funnel rising order flow to carriers, while suburban shoppers expect the same reliability once reserved for urban cores. The durable shift inflates baseline parcel traffic, raises network utilization, and supports sustained investment in facilities and automation that underpin the Australia Last Mile Delivery market.

Rising Consumer Demand for Same-day and Express Options

Speed has become a hygiene factor in major cities, where 35% of consumers willingly pay for same-day service and retailers increasingly cite delivery performance as a top loyalty driver. Australia Post's new Brisbane hub can process 176,000 parcels daily, handling surges of 90,000 additional items during peak events. Woolworths fulfilled 86% of Business-to-Consumer orders within 24 hours in 2024, up six percentage points year on year. Carriers are re-routing assets around a distributed fulfillment model that places inventory closer to demand, shrinking lead times and raising yield per parcel.

High Labor and Fuel Costs Squeezing Margins

Average delivery wages climbed to AUD 24.53 per hour in 2025 and light-truck drivers earned AUD 26.49, exposing carriers to inflation that outstrips contractual parcel-rate escalators. Price volatility at the fuel pump amplifies cost uncertainty, particularly on regional routes with low stop density. Minimum-standard rules for platform workers may lift effective cost per stop by 15% to 60%, challenging the thin margins of gig-economy models. Operators respond by tightening delivery windows, trimming unprofitable zones, and adding surcharges that dampen price elasticity.

Other drivers and restraints analyzed in the detailed report include:

Government Sustainability Push and EV Incentives
Regional Online-shopping Boom in Non-metro Areas
Urban Congestion and Kerb-access Restrictions

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

Segment Analysis

Standard Delivery held 51.67% of Australia Last Mile Delivery market share in 2025, equal to USD 2.01 billion of the Australia Last Mile Delivery market size, underscoring the continued appeal of economical options for bulk online purchases. Same-day and Express services have begun to erode that dominance as consumers embrace convenience and merchants differentiate on speed. Same-day volumes, while smaller in absolute terms, are expanding at a 5.08% CAGR to 2031, buoyed by grocery, health, and fashion segments that benefit from rapid replenishment cycles. Parcel lockers and pick-up points temper last-mile costs for merchants while sustaining speed promises, and AI-based routing boosts van utilization.

Investments flow accordingly. Australia Post's USD 33.5 million Brisbane automation project lifts hourly throughput and supports peak events without staffing surges. DHL's USD 10 million gateway upgrade in Newcastle expands express capacity along the Eastern Seaboard, while gig-enabled players like Sherpa add hyperlocal delivery for specialty retailers. As infrastructure scales, premium services may capture incremental share, yet Standard Delivery remains the baseline that underpins network density and cost absorption across the Australia Last Mile Delivery market.

The Australia Last Mile Delivery Market Report is Segmented by Service (Standard Delivery, Same-Day, Express Delivery), Business Model (Business-To-Business, Business-To-Consumer and More), End-User Industry (E-Commerce Retail, Fashion & Lifestyle, Beauty, Wellness and Personal Care, Home & Furniture, Consumer Electronics & Appliances, and More), and by Region. The Market Forecasts are Provided in Terms of Value (USD).

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List of Companies Covered in this Report:

Australia Post StarTrack DHL Express FedEx Express Toll Group Aramex Australia CouriersPlease Sendle Allied Express Pack and Send Sherpa Delivery Team Global Express SLR Trans ANC Deliveries Freight Controller Last Mile Logistics MCC World International Transdirect SEKO Logistics Estore Logistics

Additional Benefits:

The market estimate (ME) sheet in Excel format

3 months of analyst support

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