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

Market Report | 2026-02-09 | 335 pages | Mordor Intelligence

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Report description:

Saudi Arabia Courier, Express, And Parcel (CEP) Market Analysis

The Saudi Arabia courier, express, and parcel (CEP) market size in 2026 is estimated at USD 1.46 billion, growing from 2025 value of USD 1.37 billion with 2031 projections showing USD 2.01 billion, growing at 6.58% CAGR over 2026-2031. Massive infrastructure outlays under Vision 2030, preparations for Expo 2030, and early FIFA 2034 logistics planning are expanding last-mile capacity requirements, accelerating parcel volumes well beyond traditional e-commerce seasonality. Competitive positioning now hinges on real-time visibility, temperature-controlled capability, and unit-cost control achieved through AI-enabled routing and automated sortation. National Address coverage, Integrated Logistics Business Zones, and expanded air-road intermodal links are compressing delivery windows and catalyzing network redesign. Cash-on-delivery dependence, driver scarcity amid Saudization, and heat-related fleet wear remain structural cost pressures, yet operators that master digital payment integration, flexible driver sourcing, and predictive maintenance continue to defend margins.

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

Growth of E-Commerce Transactions and Digital Wallets

Soaring digital payment penetration eliminates settlement frictions that once slowed Saudi parcel handoffs. Grocery orders are increasing at an 18.2% CAGR to 2028, channeling steady volumes into temperature-controlled last-mile lanes. Wallet-based check-outs remove reverse-cash loops, lowering failed-delivery ratios and freeing couriers from armored cash pick-ups. Platforms such as HungerStation funnel cloud-kitchen output directly into courier workflows, bypassing brick-and-mortar intermediaries. Annual revenue per user now exceeds USD 600 for online food services, underscoring consumers' readiness to pay premium surcharges for reliable same-day fulfillment. These dynamics are propelling express subsegments within the Saudi Arabia courier, express, and parcel (CEP) market.

Vision 2030 Logistics-Infrastructure Spending Surge

Vision 2030 earmarks multi-billion-dollar corridors, ports, and smart-city spines that mandate high-precision inbound logistics. NEOM construction sites require just-in-time component drops, authenticated documentation, and IoT-enabled chain-of-custody oversight. Port expansions plus bonded logistics zones elevate cross-dock throughput while logistics-tech sandboxes shorten prototype-to-production cycles for innovative delivery models. Locally sourced manufacturing inputs drive B2B courier requisitions for quality-assurance samples and spare-part replenishment runs. Circular-economy ambitions further add reverse-logistics layers for recycling streams, rewarding carriers that can orchestrate forward and backward flows under unified dashboards.

High COD Preference Inflating Reverse-Logistics Costs

Cash-centric customers necessitate multiple delivery attempts and secure cash reconciliation, eroding per-parcel margin. Rural drop densities magnify fuel burn and idle time, forcing operators to cross-subsidize these lanes with urban wallet-based consignments. Returned goods workflows compound working-capital lock-ups while heightening write-off risk for perishables.

Other drivers and restraints analyzed in the detailed report include:

National Address and ILBZ Accelerating Last-Mile AccuracyExpo 2030 and FIFA 2034 Parcel-Volume SpikeCourier Driver Shortages amid Saudization Rules

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

Segment Analysis

E-commerce continues to drive 42.80% of 2025 turnover; however, healthcare parcels are outpacing all other verticals at 6.82% CAGR between 2026-2031. Telemedicine scripts, cold-chain biologics, and at-home diagnostics kits underpin recurring demand cycles with stringent compliance requirements. Ministry of Health digital initiatives mandate serialized medicine tracking, opening cross-selling pathways into secure document delivery.

Financial services and wholesale trade each necessitate armored transfer protocols or pallet-level consolidation, extending carrier service portfolios beyond standard parcel drop-offs. Primary industry volumes stem from mining and agriculture, requiring ruggedized packaging and returnable crate programs.

International consignments are growing at a 6.78% CAGR between 2026-2031, outpacing domestic flows that still account for a commanding 64.90% share of the Saudi Arabia courier, express, and parcel (CEP) market size in 2025. Blockchain-enhanced customs corridors such as TradeLens slash dwell times between Dammam and Rotterdam, allowing shippers to reposition Saudi hubs as pivots for Red Sea deviation mitigation. Domestic lines benefit from address precision but endure margin drag from COD obligations and fleet temperature stress. International lanes capture higher yield through customs brokerage and multi-leg value-added services, fortifying carrier profitability even as volume share remains below domestic dominance.

Saudi Arabia's geopolitical positioning attracts regional redistribution contracts, leveraging efficient transshipment links from Jeddah Islamic Port into GCC capitals. Regulatory sandboxes for cross-border e-commerce apps de-risk scaling strategies, enabling agile carriers to tap adjacent markets without legacy bureaucracy. As preferential trade accords are finalized, international parcel density is expected to exert positive spin-off effects on domestic backhaul optimization, reinforcing network utilization metrics across the Saudi Arabia courier, express, and parcel (CEP) market.

The Saudi Arabia 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:

Abdul Latif Jameel IPR Company Limited Ali Zaid Al Quraishi & Brothers Company (AZAQ) Aramex AyMakan DHL Group Esnad Express FedEx Flow Progressive Logistics Kadi Group Holding (including Zajil Express) Move One Saudi Post- SPL (including Naqel Express) SMSA Express Transportation Company Ltd. Uber Technologies Inc. United Parcel Service (UPS)

Additional Benefits:

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

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