

## **United Arab Emirates Courier, Express, And Parcel (CEP) - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2026 - 2031)**

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### **Report description:**

United Arab Emirates Courier, Express, And Parcel (CEP) Market Analysis

The United Arab Emirates courier, express, and parcel (CEP) market was valued at USD 1.3 billion in 2025 and estimated to grow from USD 1.4 billion in 2026 to reach USD 2.05 billion by 2031, at a CAGR of 7.85% during the forecast period (2026-2031). Strong non-oil trade growth, a busy transshipment ecosystem anchored by Jebel Ali Port and Dubai International Airport, and the government's network of Comprehensive Economic Partnership Agreements (CEPAs) collectively accelerate shipment volumes while lowering cross-border friction. Additional tailwinds include high urban smartphone penetration that fuels online shopping, continuing infrastructure upgrades at Dubai World Central (DWC) and Abu Dhabi's Khalifa Economic Zones, and steady inflows of private capital into last-mile automation and cold-chain capacity. Competitive pressure remains moderate as global integrators, regional airlines, and local specialists race to widen service portfolios especially for healthcare, temperature-controlled, and hyper-local delivery niches. Meanwhile, heightened geopolitical volatility in regional sea-lanes underscores the strategic value of diversified air and road corridors that keep the United Arab Emirates courier, express, and parcel (CEP) market resilient in the face of external shocks.

United Arab Emirates Courier, Express, And Parcel (CEP) Market Trends and Insights

Booming E-Commerce Penetration

Rapid online retail growth reshapes parcel profiles and heightens service-level expectations, with leading marketplaces

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increasingly promising same-day fulfillment in Dubai and Abu Dhabi. Electronics, fashion, and fast-moving consumer goods dominate order mix, yet temperature-controlled categories such as beauty and groceries are rising fast, pushing carriers to invest in insulated packaging and cold-chain micro-hubs. Card-based and mobile wallets already enjoy near-ubiquitous usage, compressing checkout times and cutting fraud-related reversals. Marketplaces are also co-locating inventory inside airline-linked free zones so that air-to-door transit can be shortened to under 24 hours for key regional lanes. Collectively, these shifts reinforce high-frequency, light-weight parcel flows that underpin the United Arab Emirates courier, express, and parcel (CEP) market.

#### Cross-Border Trade Expansion via CEPAs

By 2025 the UAE has 10 CEPAs in force and a broader portfolio of 26-28 under signature, materially smoothing customs clearance and documentation. The UAE-India accord remains the flagship example: bilateral non-oil trade jumped 20.5%, with Emirati exports soaring 75% since enactment. Faster brokerage windows enable next-day transfer from origin free zone to consignee in Mumbai or Delhi, slashing dwell times and boosting load factors on both air and trucking legs. Similar momentum is evident on newer corridors to Türkiye, Israel, and Indonesia, amplifying outbound parcel density and back-haul utilization. Integrators and postal operators are, in turn, enlarging bonded sortation footprints at Jebel Ali and Dubai South to tap CEPA-enabled flow.

#### High Last-Mile Cost and COD Complexity

Cash-on-delivery orders still account for a sizable share of B2C traffic, forcing couriers to reconcile funds and carry return risks that push unit costs 15-25% above prepaid equivalents. Though Dubai's Makani and Abu Dhabi's Onwani digital address schemes have improved accuracy, patchy coverage in newer or low-density districts raises re-delivery attempts and driver idle time. Carriers are trialing dynamic micro-depots and bike couriers to shrink travel radii, yet route density remains below optimal levels outside core business zones. Investments in AI-driven routing and doorstep POS terminals offer relief but cannot fully offset the inherent manual touches that weigh on profitability.

Other drivers and restraints analyzed in the detailed report include:

Logistics-Infrastructure Build-Out Digital Payment and BNPL Adoption Labor-Supply Constraints and Rising Wages

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

#### Segment Analysis

E-commerce remained the top vertical at 42.90% in 2025, yet healthcare consignments-encompassing prescription drugs, vaccines, and diagnostic samples are set to post an 8.18% CAGR between 2026-2031. Regulatory alignment with EU GDP (Good Distribution Practice) and the Ministry of Health's strict cold-chain audit regime catalyze carrier investments in GDP-certified vehicles and data-loggers. Emirates' cargo arm has quadrupled cool-cell capacity since 2023, allowing temperature-sensitive parcels to transfer within two hours of touchdown.

Manufacturing-led shipments, including oilfield spares and aerospace components, provide steady baseline volume, while luxury retail benefits from tourism-induced spending. Financial and legal documents, though declining in volume due to digitization, still demand chain-of-custody security, sustaining premium document couriers inside the United Arab Emirates courier, express, and parcel (CEP) market.

Domestic deliveries still anchor 64.85% of the United Arab Emirates courier, express, and parcel (CEP) market in 2025, fueled by dense intra-city e-commerce traffic and established COD workflows. Yet the international lane propelled by CEPA tariff relief, bonded free-zone services, and airline belly-hold capacity is expanding at an 8.12% CAGR between 2026-2031 that eclipses

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domestic growth. Emirates SkyCargo and integrators like DHL Express increasingly route South Asian, African, and European parcels through Dubai as a central pivot, reducing total transit times by up to 48 hours compared with traditional sea-air alternatives. Pharmaceutical and high-value electronics brands now leverage these consolidated flows for time-definite deliveries into India and East Africa, paying premiums that lift segment yields.

The domestic market, though mature, is not static. Same-day grocery, meal kit, and electronics replacements require tighter fulfillment radii and push fleets toward electric vans and motorcycles suitable for urban alleys. Government smart-city programs are allocating curb-side loading bays and parcel lockers, helping carriers shave unloading times. As address digitization broadens, failed delivery rates are projected to fall, preserving the domestic segment's cost competitiveness even while international lanes gain strategic prominence across the United Arab Emirates courier, express, and parcel (CEP) market.

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

List of Companies Covered in this Report:

Aramex Century Express Courier Services LLC DHL Group Emirates Post FedEx First Flight Couriers (Middle East) LLC Postaplus Uber Technologies Inc. United Parcel Service (UPS) ZAJEL Courier Services

Additional Benefits:

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

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