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Global Express and Small Parcels 2019 - Market Report

The global express and small parcels market continues to be driven forward by e-commerce but there are challenges on the horizon in the shape of slowing global economies, lower international trade growth and cross-border reform. Global Express and Small Parcels 2019 examines these challenges whilst assessing the opportunities for growth within alternative delivery networks, cross-border B2C e-commerce.

The report also contains Ti's in-house market sizing, with both 5-year CAGR and 2019 full year estimates. There are also in-depth case studies of alternative delivery networks, including Amazon, Alibaba and JD.com's locker networks and analysis of how changes to foreign market access might impact on low cost e-retailers.

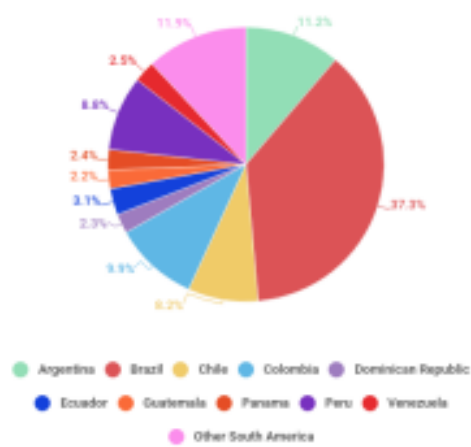
Finally the report looks at the express market in regional terms – reviewing regional market structure and competitive landscape.

This report contains:

- Market sizing – 2018 full year market sizing and 2018-2023 CAGR forecasts
- Case studies of alternative delivery networks and automotive opportunities
- Analysis of the automotive express supply chains.
- Assessment of cross-border e-commerce challenges and looks at the potential impacts of upcoming postal reform on express carriers, postal operators and customs authorities.
- Comparative review of major express players, including market activity by region.

A sneak preview

Figure 5.31 South America Express & Small Parcels: Total Market Size by Country (% to Total) (2023)



5.8 Sub-Saharan Africa Express & Small Parcels Market Size & Growth

The Sub-Saharan African parcels market grew 6.3% in real terms in 2018 and is projected to grow 6.7% in 2019. For the domestic segment, the corresponding growth rates for 2018 and 2019 are 6.0% and 6.7% respectively. The international market growth rates for 2018 and 2019 are 6.9% and 6.6% respectively.

Figure 5.32 Sub-Saharan Africa Express and Small Parcels Market Size and Growth

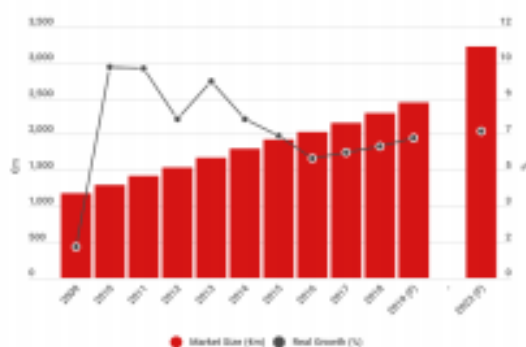


Figure 6.60 South and Latin American Express Providers-Annual Shipment Volumes (2018) (m)



Source: Ti/company accounts

2016-2018 Estafeta and Mercado Envios' 2016-2018 volumes comparison

Estafeta's volume has not been growing as dramatically as that of Mercado Envios between 2016 and 2018. In 2018, the Mexican provider delivered around 30.5m parcels, up by 1.6% year-on-year (2017: 30m), thereby reversing the negative trend from 2017 when the company's volumes decreased by 2.2% year-on-year. For comparison, Mercado Envios' volume achieved a steady and fast growth between 2016 and 2018.

In 2016, Mercado Envios' volume reached its highest growth, increasing by 91.4% year-on-year. In 2017, Mercado Envios achieved a 74.2% year-on-year increase. A similar growth was also achieved in 2018, when the company recorded a 73.7% year-on-year increase.

Figure 6.61 South and Latin American Express Providers- 2016-2018 volume growth (m)



Source: Ti/company accounts

Employees

Correos de Chile and Estafeta's employee numbers are very similar to each other, with the Chilean post office employing about 6,000 staff, and the Mexican provider having just around 6,800. Even though both Jadlog and Correos are express operators for which Brazil is a

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Key questions the report asks and answers:

- How large was the global express and small parcels market in 2018, and how has that developed into 2019?
- What are the express opportunities in the automotive sector and what must providers do to compete?
- Alternative delivery solutions - what are the strategic implications and benefits?
- What impact will postal reform have on cross-border e-commerce, and will LSPs stand to benefit?
- What are the growth prospects for domestic and international express over the next 5 years?
- What, and where are opportunities for growth within the express market?

“There are significant bright spots for the express market, not least in e-commerce. Despite conditions softening, the unique market conditions in China means it once again stands out as a major driver of global growth.”

Andy Ralls, report author

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