E-commerce Last-mile Delivery Market Size & Share Analysis - Growth Trends and Forecast (2026 - 2031)

> **Industry:** E-Commerce Logistics & Warehousing (Logistics & Supply Chain)
> **Source:** https://www.mordorintelligence.com/industry-reports/global-e-commerce-last-mile-delivery-market
> **Scraped Date:** 2026-09-17

Executive Market Summary

Market Metric	Details
Base Market Size	USD 231.61 billion
Projected Forecast (2031)	USD 231.61 billion
Growth Rate (CAGR)	10.85 %
Largest Market Region	N/A
Fastest-Growing Region	N/A

Market Visualizations & Infographics

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![Major players in E-commerce Last-mile Delivery industry](images/chart_2.png)

![E-commerce Last-mile Delivery Market Size](images/chart_3.png)

![E-commerce Last-mile Delivery Market Share by Delivery Type, 2025](images/chart_4.png)

![E-commerce Last-mile Delivery Market Share by Product Type, 2025](images/chart_5.png)

![E-commerce Last-mile Delivery Market Growth Rate by Region](images/chart_6.png)

![E-commerce Last-mile Delivery Market Concentration](images/chart_7.png)

![Icon](images/chart_8.png)

![footer background image](images/chart_10.png)

![Mordor Intelligence on Facebook](images/chart_12.svg)

![Mordor Intelligence on Pinterest](images/chart_14.svg)

![Mordor Intelligence on Instagram](images/chart_15.svg)

![ESOMAR](images/chart_17.png)

![GPTW](images/chart_19.png)
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Comprehensive Research Analysis

Overview Points List Flex 49 Share Feature End

Market Overview

Study Period | 2020 - 2031 |
Market Size (2026) | USD 231.61 Billion |
Market Size (2031) | USD 387.69 Billion |
Growth Rate (2026 - 2031) | 10.85 % |
Fastest Growing Market | Asia-Pacific |

Largest Market | Asia-Pacific |
Market Concentration | Low |
Major Players*Disclaimer: Major Players sorted in no particular order

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Market Overview

E-commerce Last-mile Delivery Market Analysis by Mordor IntelligenceThe global e-commerce last-mile delivery market was valued at USD 207.92 billion in 2025 and is expected to grow to USD 231.61 billion in 2026, reaching USD 387.69 billion by 2031, at a CAGR of 10.85% over 2026-2031.

The global e-commerce last-mile delivery market is gaining momentum from higher parcel density in urban corridors, faster same-day infrastructure rollout, and wider adoption of route optimization tools across carrier networks. The current phase of the global e-commerce last-mile delivery market is more structural than the earlier pandemic surge because carriers are now treating logistics assets as revenue products, a shift that became visible when Amazon opened its fulfillment and delivery network to outside businesses in May 2026. Cost pressure still matters in the market because driver shortages remain severe.

Key Report Takeaways

* By delivery type, standard delivery accounted for 58.20% of the global e-commerce last-mile delivery market share in 2025, while same-day delivery is forecast to expand at a 14.30% CAGR through 2031.
* By delivery model, B2C accounted for 66.56% of the global e-commerce last-mile delivery market size in 2025, while C2C recorded the highest projected CAGR of 16.97% through 2031.
* By city tier, Tier 2 cities accounted for 38.02% of the global e-commerce last-mile delivery market share in 2025, while Tier 3 and below are projected to grow at a 13.90% CAGR through 2031.
* By product type, consumer electronics and household appliances accounted for 24.50% of the global e-commerce last-mile delivery market size in 2025, while foods and beverages are forecast to expand at a 13.10% CAGR through 2031.
* By geography, Asia-Pacific accounted for 38.41% of the global e-commerce last-mile delivery market share in 2025 and recorded the fastest projected regional CAGR of 11.93% through 2031.

Key Market Trends

Global E-commerce Last-mile Delivery Market Trends and InsightsDrivers Impact Analysis*

Driver	(~) % Impact on CAGR Forecast	Geographic Relevance	Impact Timeline
E-Commerce Order Density Growth in Urban Corridors	+2.1%	Global, with the highest concentration in Asia-Pacific and North America	Short term (≤ 2 years)
Same-Day and Next-Day Service Penetration	+1.8%	Asia-Pacific core, spill-over to North America and Western Europe	Short term (≤ 2 years)
Cross-Border Parcel Network Expansion	+1.5%	Global, with the highest intensity in the Europe-Asia and the Americas trade lanes	Medium term (2-4 years)
Retailer-Owned Delivery Networks and Private Fleets	+1.2%	North America and China, early gains in India and Southeast Asia	Medium term (2-4 years)
Delivery-Orchestration Software and Route Optimization Adoption	+1.0%	Global, advanced adoption in North America, the EU, and Australia	Long term (≥ 4 years)
Micro-Fulfillment and Dark Store Proximity Economics	+0.9%	Urban centers glo	

bally, with the fastest uptake in India, China, and the United Kingdom | Medium term (2-4 years) |
Source: Mordor Intelligence |

Competitive Landscape

Competitive Landscape

The global e-commerce last-mile delivery market is less fragmented, with a small group of large international operators holding strong positions in developed markets and several regional champions retaining deep local strength. Amazon Logistics, DHL Group, UPS, and FedEx remain important scale players, while JD Logistics, SF Express, Delhivery, J&T Express, and Geopost are influential in their home regions. The competitive edge in the global e-commerce last-mile delivery market is shifting from pure network size to network intelligence, because route orchestration, demand visibility, and asset productivity now shape margins more directly than basic footprint claims. Amazon’s May 2026 rollout of Amazon Supply Chain Services illustrates this shift, as it opened the company’s fulfillment and delivery network to outside brands and turned its internal logistics capabilities into a standalone service offering[4]Source: Reuters Staff, “Amazon Opens Up Its Logistics Network to Other Businesses,” Reuters, reuters.com.. FedEx’s February 2026 InPost transaction shows the same logic from another angle, with locker density used to cut residential delivery costs and improve service flexibility across Europe.

Strategies in the global e-commerce last-mile delivery market are also diverging based on the parcel segments that carriers aim to defend. In its January 2026 earnings release, UPS stated that it had reduced its Amazon-related daily volume by approximately 1 million packages during the first half of 2026 and shifted its focus toward small and medium-sized businesses, B2B, and healthcare shipments. This move indicates that some established carriers increasingly prioritize yield quality over overall parcel volume. Geopost’s 31% increase in out-of-home volumes in 2025 points to another path: carriers improving economics by moving consumer traffic toward lockers and parcel shops rather than doorstep delivery. The global e-commerce last-mile delivery market is therefore separating into premium service defenders, consumer-density optimizers, and network builders that want to monetize logistics capacity beyond their original core business.

Chinese operators are a particularly important competitive force in the global e-commerce last-mile delivery market because they are pairing domestic execution playbooks with overseas buildouts. JD Logistics entered 4 major European markets with JoyExpress in February 2026, and Cainiao continued to deepen automation and cross-border capability in 2026. This creates pressure on incumbent operators that depend on slower network adaptation or weaker consumer-facing convenience infrastructure. Compliance demands such as data protection and customs controls still create entry barriers. Still, the direction of competition in the global e-commerce last-mile delivery market is clearly toward denser consumer networks, more automation, and tighter control of cross-border parcel handoffs.

E-commerce Last-mile Delivery Industry Leaders* Amazon Logistics

* United Parcel Service (UPS)

* FedEx Corporation

* DHL Group

* United States Postal Service (USPS)

* *Disclaimer: Major Players sorted in no particular order

Component Component 3 Scope Of The Report Bottom

Global E-commerce Last-mile Delivery Market Report ScopeBy Delivery TypeStandard Delivery |
Same-Day Delivery |
Next-Day Delivery |

Segmentation Accordion Item

By Region/CountryNorth America | United States |
| Canada |
| Mexico |
South America | Brazil |
| Peru |
| Chile |
| Argentina |
| Rest of South America |
Asia-Pacific | China |
| Japan |
| India |
| South Korea |
| Australia |
| South East Asia |
| Rest of Asia-Pacific |
Europe | United Kingdom |
| Germany |
| France |
| Spain |
| Italy |
| BENELUX (Belgium, Netherlands, and Luxembourg) |
| NORDICS (Denmark, Finland, Iceland, Norway, and Sweden) |
| Rest of Europe |
Middle East and Africa | United Arab Emirates |
| Saudi Arabia |
| South Africa |
| Nigeria |
| Rest of the Middle East And Africa |

Frequently Asked Questions

What is the 2031 value expected for global e-commerce last-mile delivery?

The global e-commerce last-mile delivery market is forecast to reach USD 387.69 billion by 2031, rising from USD 231.61 billion in 2026 at a 10.85% CAGR over 2026-2031.

Which region leads global e-commerce last-mile delivery?

Asia-Pacific led with a 38.41% share in 2025 and is also the fastest-growing region, with a 11.93% CAGR through 2031

Which delivery service is growing fastest in last-mile delivery for e-commerce?

Same-day delivery is the fastest-growing delivery type, with a projected 14.30% CAGR through 2031, even though Standard Delivery remained the largest segment in 2025.

Why are dark stores important for parcel delivery growth?

Dark stores shorten delivery distances, support 10-15-minute fulfillment models, and improve same-day economics in dense urban areas.

What is the biggest labor risk for delivery operators?

Driver shortages remain a major constraint, with IRU reporting 2.9 million unfilled truck driver roles across 18 surveyed markets in 2025.

Which product category is expanding fastest in e-commerce last-mile delivery?

Foods and beverages are the fastest-growing product type, with a projected 13.10% CAGR through 2031, supported by quick-commerce and proximity fulfillment models