South America Domestic CEP Market Size & Share Analysis - Growth Trends and Forecast (2026 - 2031)

> **Industry:** Express, CEP & Last-Mile Delivery (Logistics & Supply Chain)
> **Source:** https://www.mordorintelligence.com/industry-reports/south-america-domestic-cep-market
> **Scraped Date:** 2026-09-17

Executive Market Summary

Market Metric	Details
Base Market Size	USD 7.92 billion
Projected Forecast (2031)	USD 7.92 billion
Growth Rate (CAGR)	5.52 %
Largest Market Region	N/A
Fastest-Growing Region	N/A

Market Visualizations & Infographics

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![Major players in South America Domestic CEP industry](images/chart_2.png)

![South America Domestic CEP Market Size](images/chart_3.png)

![South America Domestic CEP Market Share by Speed of Delivery, 2025](images/chart_4.png)

![South America Domestic CEP Market Share by Business Model, 2025](images/chart_5.png)

![South America Domestic CEP Market Share by Mode of Transport, 2025](images/chart_6.png)

![South America Domestic CEP Market Concentration](images/chart_7.png)

![Icon](images/chart_8.png)

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

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![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 |
Forecast Data Period | 2026 - 2031 |
Base Year Market Size (2025) | USD 7.46 Billion |
Market Size (2026) | USD 7.92 Billion |
Market Size (2031) | USD 10.36 Billion |

Growth Rate (2026 - 2031)	5.52 %
Market Concentration	Medium
Major Players*Disclaimer: Major Players sorted in no particular order Image © Mordor Intelligence. Reuse requires attribution under CC BY 4.0. 	

Market Overview

South America Domestic CEP Market Analysis by Mordor IntelligenceThe South America Domestic CEP Market size was valued at USD 7.46 billion in 2025 and is estimated to grow from USD 7.92 billion in 2026 to reach USD 10.36 billion by 2031, at a CAGR of 5.52% during the forecast period (2026-2031).

E-commerce order density was increasing across large cities and smaller urban corridors, which supported parcel volumes and fulfillment investment. Instant payment systems reduced the time between checkout and shipment release, making integration with payment rails more important for carriers. Marketplace operators and global integrators were investing in sorting, fulfillment, and last-mile capacity, which changed the competitive position of conventional providers. The South America domestic CEP market offered opportunities for operators that connected effectively with marketplace systems and delivered reliable service at competitive prices. Fuel costs, security incidents, and road constraints continued to weigh on margins and network reach.

Key Report Takeaways

* By speed of delivery, non-express services held 77.40% of the South America domestic CEP market share in 2025, while express delivery was forecast to grow at a 6.44% CAGR through 2031.
* By business model, B2C held 53.17% of the South America domestic CEP market size in 2025 and also recorded the highest projected CAGR at 6.61% through 2031.
* By shipment weight, light-weight shipments accounted for 72.54% of the South America domestic CEP market size in 2025 and were forecast to expand at a 5.69% CAGR through 2031.
* By mode of transport, road transport held 63.39% of the South America domestic CEP market share in 2025, while air freight was forecast to grow at a 6.32% CAGR through 2031.
* By end-user industry, manufacturing held 39.24% of the South America domestic CEP market size in 2025, while e-commerce was forecast to expand at a 6.01% CAGR through 2031.
* By country, Brazil held 50.45% of the South America domestic CEP market share in 2025, while Peru was forecast to grow at a 6.60% CAGR through 2031.

Key Market Trends

South America Domestic CEP Market Trends and InsightsDrivers Impact Analysis*

Driver	(~) % Impact on CAGR Forecast	Geographic Relevance	Impact Timeline
E-Commerce Parcel Density and Marketplace Fulfillment Expansion	+1.8%	Brazil, Argentina, Chile, Colombia	Short term (≤ 2 years)
Same-Day and Next-Day Delivery Expectations in Major Urban Corridors	+0.9%	São Paulo, Buenos Aires, Santiago, Bogotá, Lima	Short term (≤ 2 years)
Instant-Payment Adoption Enabling Faster Order Release	+0.8%	Brazil primarily, Colombia and Chile follow-on	Medium term (2-4 years)
Dark-Store and Micro-Fulfillment Expansion	+0.6%	Brazil, with expansion to Chile and Colombia	Medium term (2-4 years)
Transport-Corridor and Multimodal Infrastructure Investment	+0.4%	Southern Cone, Brazil, Paraguay, Argentina, Chile	Long term (≥ 4 years)
Healthcare, Perishables, and Temperature-Controlled Parcel Demand	+0.4%	Braz	

il, Colombia, Peru | Medium term (2-4 years) |
Source: Mordor Intelligence |

Competitive Landscape

Competitive Landscape

The South America domestic CEP market was moderately concentrated at the national level and distributed across city clusters. Marketplace-integrated logistics became a key performance benchmark because leading platforms directed large shares of volume through their own fleets and sortation networks. MercadoLibre routed 94% of its parcels through its own infrastructure in 2025. Legacy postal operators responded with multiyear programs that combined physical delivery with digital payment and tracking functions. Technology-focused providers used dynamic route planning and wider platform connectivity to compete with established networks.

Loggi increased its e-commerce connections from 28 to 49 in 2025, covering 90% of online retail used by small and medium-sized businesses. DHL committed resources to a Sao Paulo hub intended for next-day service, and it announced plans to expand its regional reach through the Aero Cargas acquisition in September 2026. MercadoLibre strengthened its fulfillment presence through a 2026 program targeting 42 distribution centers. These moves increased the importance of network density, platform connectivity, and time-definite delivery. Global integrators focused more closely on healthcare and specialized logistics where service requirements were higher.

Healthcare logistics offered a defensible area because cold-chain infrastructure, certification, and trained personnel created barriers to entry. Secondary-city last-mile delivery also remained open as PUDO networks and small-seller volumes developed. Ride-hailing and quick-commerce providers increased price pressure in fast urban delivery categories through large driver pools. Pix integration became a competitive requirement because faster confirmation improved order release and working-capital efficiency.

South America Domestic CEP Industry Leaders* Empresa Brasileira de Correios e Telegrafos

* MercadoLibre, Inc.

* DHL Group

* Loggi Tecnologia Ltda.

* La Poste Group (Including DPD Group)

* *Disclaimer: Major Players sorted in no particular order
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Component Component 3 Scope Of The Report Bottom

South America Domestic CEP Market Report ScopeBy Speed of DeliveryExpress |
Non-Express |

Segmentation Accordion Item

By CountryArgentina |
Brazil |
Chile |
Colombia |
Peru |
Rest of South America |

Frequently Asked Questions

What was the value of domestic courier, express, and parcel activity in South America?

The South America domestic CEP market size is valued at USD 7.92 billion in 2026 and forecast to reach USD 10.36 billion by 2031. E-commerce volumes and fulfillment investment supported this expansion across the South America domestic CEP market. Network investment focused on fulfillment centers, sorting capacity, and last-mile coverage.

What was the forecast growth rate through 2031?

The South America domestic CEP market was forecast to grow at a CAGR of 5.52% from 2026 to 2031. Payment integration and last-mile capacity were key operating considerations. Fuel costs and delivery constraints remained important risks for service providers.

Which delivery speed category held the largest share?

Non-express services held 77.40% revenue share in 2025, while express delivery was projected to grow faster at a 6.44% CAGR. Economy shipping continued to provide the broader shipment base. Faster services gained importance mainly where urban parcel density could support them.

Which customer channel drove growth?

B2C held 53.17% revenue share in 2025 and was projected to grow at a 6.61% CAGR through 2031. Small online sellers added to consumer parcel demand. Payment confirmation and returns management remained material elements of the service model.

Why was air transport expanding faster than other modes?

Healthcare parcels, perishable exports, and high-value electronics supported air freight's forecast 6.32% CAGR through 2031. These flows required faster and more controlled transport. Dedicated air capacity improved access to locations where road networks had longer transit times.

Which country was expected to expand fastest?

Peru was forecast to grow at a 6.60% CAGR through 2031, supported by provincial e-commerce demand and new trade flows. The opening of the Port of Chancay supported these flows. Improved trade connectivity created additional demand for domestic delivery services.