South America International 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-international-cep-market
> **Scraped Date:** 2026-09-17

Executive Market Summary

Market Metric	Details
Base Market Size	USD 4.36 billion
Projected Forecast (2031)	USD 4.36 billion
Growth Rate (CAGR)	5.84 %
Largest Market Region	N/A
Fastest-Growing Region	N/A

Market Visualizations & Infographics

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

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

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

![South America International CEP Market Share by Mode of Transport, 2025](images/chart_5.png)

![South America International CEP Market Concentration](images/chart_6.png)

![Icon](images/chart_7.png)

![footer background image](images/chart_9.png)

![Mordor Intelligence on Facebook](images/chart_11.svg)

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![ESOMAR](images/chart_16.png)

![GPTW](images/chart_18.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 4.09 Billion |
Market Size (2026) | USD 4.36 Billion |
Market Size (2031) | USD 5.79 Billion |
Growth Rate (2026 - 2031) | 5.84 % |
Market Concentration | Medium |
Major Players*Disclaimer: Major Players sorted in no particular order

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Market Overview

South America International CEP Market Analysis by Mordor IntelligenceThe South America International CEP Market size was valued at USD 4.09 billion in 2025, and it is expected to grow from USD 4.36 billion in 2026 to reach USD 5.79 billion in 2031, growing at a CAGR of 5.84% from 2026 to 2031.

Cross-border e-commerce, larger fulfillment networks, and customs modernization are supporting parcel flows across the region. Digital payments and direct-to-consumer selling are making cross-border purchases easier for more households. Carriers are also extending service coverage beyond major cities, which creates demand in locations that had fewer reliable delivery options. Currency volatility, freight costs, and security expenses continue to affect prices and operating margins. The South America International CEP market, therefore, combines steady demand for lower-cost parcel services with rising demand for faster, time-defined delivery.

Key Report Takeaways

* By speed of delivery, non-express services held 76.70% of the South America International CEP market share in 2025, while express services are projected to grow at a 6.76% CAGR through 2031.
* By business model, B2C held 52.66% of the South America International CEP market size in 2025 and is projected to grow at a 6.93% CAGR through 2031.
* By shipment weight, light-weight shipments held 73.06% of the South America International CEP market share in 2025 and are projected to grow at a 6.01% CAGR through 2031.
* By mode of transport, road held 52.9% of the South America International CEP market size in 2025, while air is projected to grow at a 6.96% CAGR through 2031.
* By end-user industry, manufacturing held 39.55% of the South America International CEP market share in 2025, while e-commerce is projected to grow at a 6.33% CAGR through 2031.
* By geography, Brazil held 50.32% of the South America International CEP market size in 2025, while Peru is projected to grow at a 6.92% CAGR through 2031.

Key Market Trends

South America International CEP Market Trends and InsightsDrivers Impact Analysis*

Driver	(~) % Impact on CAGR Forecast	Geographic Relevance	Impact Timeline
Cross-Border E-Commerce and Digital-Trade Expansion	+1.5%	Brazil, Colombia, Chile, Peru	Short term (≤ 2 years)
Growing Demand for Time-Definite International Delivery	+0.9%	Brazil, urban Argentina	Short term (≤ 2 years)
Customs Digitization and Trade-Facilitation Reforms	+0.7%	Brazil, Chile	Medium term (2-4 years)
E-Commerce Marketplace Fulfillment Investment	+1%	Brazil, Argentina	Short term (≤ 2 years)
South America-to-Asia Air-Cargo Corridor Development	+0.6%	Brazil, Peru, Chile	Long term (≥ 4 years)
Bonded Micro-Hubs and Border-Adjacent Fulfillment	+0.4%	Brazil, Uruguay-Argentina border, Paraguay corridor	Medium term (2-4 years)
Source: Mordor Intelligence			

Competitive Landscape

Competitive Landscape

The South America International CEP market has a medium concentration. DHL Group , FedEx, and UPS compete in premium time-defined lanes through established customs capabilities and air-gateway networks. Mercado Libre’s logistics operation, Loggi, Chilexpress, Andreani, and Correios compete across e-commerce and lower-cost parcel services. This structure combines international integrators with regional and domestic specialists. The largest global players are strong in complex cross-border requirements and higher-value services. Regional operators compete through local reach, service flexibility, and cost. The South America International CEP market is not controlled by one operator because service needs differ across countries and shipment types.

E-commerce platforms are expanding their role in logistics as they seek more control over delivery quality. This changes the relationship between marketplace operators and traditional carriers. Platform-operated fulfillment can improve inventory placement, sorting, and last-mile coordination. It can also create new shipment demand in areas where delivery coverage is improving. Carriers remain important for international linehaul, customs clearance, specialized deliveries, and routes outside platform networks. The South America International CEP market is therefore seeing closer competition between platform logistics and asset-based carriers. Operators that can combine local delivery capacity with dependable international handling are better placed to serve sellers and buyers.

DHL Group’s acquisition of Aero Cargas in Uruguay expands its Southern Cone presence in pharmaceutical and free-trade-zone logistics. UPS is investing more than USD 2 billion globally through 2028 in international, healthcare, and supply-chain businesses, with the Americas identified as a priority region[4]Source: UPS, “UPS Invests More Than USD 2 Billion to Give Customers Even Faster Service,” UPS Newsroom, about.ups.com.. Aramex reorganized its operating structure through its Accelerate28 program, with its 2025 results pointing to demand changes from nearshoring and regionalization. Competitive opportunities remain in bonded micro-hubs, pharmaceutical cold-chain services, and technology-enabled C2C flows. These opportunities require strong security controls, route knowledge, and compliance capabilities. The South America International CEP market remains competitive because global scale alone does not solve local delivery constraints.

South America International CEP Industry Leaders* FedEx

* Chilexpress S.A.

* Correos de Chile

* United Parcel Service, Inc.

* DHL Group

* *Disclaimer: Major Players sorted in no particular order

Component Component 3 Scope Of The Report Bottom

South America International 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 is the forecast for South America international CEP services?

Value is projected to reach USD 5.79 billion by 2031, growing at a 5.84% CAGR from 2026.

Which delivery speed category is growing fastest in South America?

Express services are projected to grow at a 6.76% CAGR through 2031, faster than non-express services.

Why is B2C parcel delivery important in South America?

B2C held 52.66% of value in 2025 and is projected to grow at a 6.93% CAGR through 2031.

Which country leads regional international CEP demand?

Brazil held 50.32% of the value in 2025, supported by its large consumer base and role as an import gateway.

Which country is forecast to grow fastest?

Peru is forecast to grow at a 6.92% CAGR through 2031, supported by trade activity and e-commerce demand.

What are the main risks for courier operators in South America?

Currency exposure, uneven infrastructure, cargo theft, and fragmented customs processes can increase costs and reduce delivery predictability.