

Express Benchmarking 2009 - European (EU-14)

Summary

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Abstracts

Introduction

Since the onset of the global economic downturn the European Courier, Express and Parcels market has changed significantly. The Express Benchmarking report includes overall market shares for the leading players in Europe, as well as across all of the significant market segmentations such as Service level (Express - Parcell, Destination (Domestic - International) and Recipient (B2B - B2C/C2C).

Scope

*Analyses the largest players in the Express market, including DHL, UPS, TNT and FedEx as well as all of the main regional European companies.

*Analyses the key metrics in the industry: overall market shares, as well as by sub-segmentations such as destination, service level and recipient.

Highlights

The European (EU-14) Courier, Express and Parcels (CEP) market amounted to EUR41.3bn in 2008 which implied a year-on-year growth rate of 4%. The top 5 DHL (Deutsche Post), La Poste/ Geopost, TNT, UPS and Royal Mail/GLS controlled over half of this total but are facing tough competition from other players in an extremely challenging environment.

DHL is still the leader in the European Courier, Express and Parcels (CEP) market with a share of just under 18%, while TNT follows behind but they, as well as the other

integrators FedEx and UPS, are challenged by national and regional road-based operators that are benefitting from the shift in demand towards more cost-effective alternatives.

The global economic downturn has caused a major shift as customers switch towards more Economy-type of products, which has increased competitive pressures on integrators whilst incumbent post offices and other local operators all try to attract volume transforming the competitive landscape in Europe and creating an extremely challenging environment.

Reasons to Purchase

*Understand the competitive environment in the European express market, as well as analyse your competitors' strengths and weaknesses.

*Understand how the economic downturn is affecting the competitive positions of postal and express companies.

*Understand which Express companies have the largest market shares in Europe.

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