

Central and Eastern Europe Courier, Express, and Parcel (CEP) - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2024 - 2030)

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Abstracts

The Central and Eastern Europe Courier, Express, and Parcel (CEP) Market size is estimated at 14.66 billion USD in 2024, and is expected to reach 18.03 billion USD by 2030, growing at a CAGR of 3.51% during the forecast period (2024-2030).

Developing CEP segment in the region owing to services expansion, reducing tariffs, and growing e-commerce usage

In 2022, CEP players in Hungary have taken the initiative to develop the segment. For instance, Hungarian operator Magyar Posta increased its distribution capacity with Leonardo's new sorting system in 2022. Leonardo is a major provider of automated solutions for small packets and parcels. The system, which would be supplied during 2023, is designed to process domestic and international parcels, wherein it could potentially process up to 100 million parcels a year. Also, Hungary-based FoxPost serves 20,000 businesses in Hungary, with 2,500 parcel lockers in Hungary.

Zalando, Europe's leading online fashion and lifestyle platform, partnered with local logistics and technology Czech company Z?ilkovna in 2021. The move responds to the shift in preferences of Czech customers wherein 1 in 4 Czechs chose pick-up points, and the preference for pick-up via parcel lockers rose from 0% to 6% in 3 years. Through the partnership, Zalando customers can use 1,500 Z?ilkovna lockers and 4,700 pick-up points, with cash on delivery as one of the payment options. The aim is to cater to local customer preferences and provide convenience to Czech customers. Also, Nova Poshta, a major Ukrainian postal carrier, made a 2.5-fold reduction in tariffs for

sending personal items to Poland in 2022, and this was done owing to the rise in the number of Ukrainians in Poland due to the war.

E-commerce is a major driver for CEP demand in the region. For instance, 85.07% of online consumers in Slovakia were most likely to make purchases online in 2022. Share of internet users in Romania and Bulgaria stood at 51.46% and 48.78%, respectively, in 2022. With e-commerce user penetration to touch 3.18 million by 2027 in Slovakia, the demand for CEP is also projected to rise in the region.

E-commerce market in the CEE region hit USD 34.63 billion in 2022 generating the demand for CEP deliveries

The e-commerce market in the CEE region reached a value of USD 34.63 billion in 2022, with the fashion and electronics segments leading the revenue shares with 31.68% and 28.10%, respectively. In 2022, Poland (USD 27.80 billion) had the highest e-commerce share in the region, followed by Czechia (USD 13 billion). In 2022, residents of Slovakia (85%) were the most likely to shop online in CEE countries. The percentage of people in Slovakia shopping online was 10% higher compared to the EU average in 2022. Czechia, Hungary, and Estonia were rated above average for using e-commerce among the 27 EU countries.

Poland is another country in the region providing domestic and international express delivery services. Poczta Polska, the national postal service, provides these services via express mail service (EMS). Poczta Polska facilitates door-to-door international express deliveries via EMS to over 170 countries. The maximum weight of shipments of domestic and international goods is 20 kg. The national postal service has special lowered rates for EMS shipments being delivered to the Czech Republic and Slovakia due to their proximity.

Due to increased demand, Romania is one of the countries in the region providing domestic and international express delivery services. The Romanian Post, the national postal service, provides this service via its EMS. The domestic delivery weight limit is 15 kg for ordinary parcels and 20 kg for invisible contents. The express delivery service can cater to international deliveries to about 105 countries from Romania. The maximum weight of parcels for these shipments at the time of posting and delivery should be 31.5 kg.

Central and Eastern Europe Courier, Express, and Parcel (CEP) Market Trends

Albania faces slower growth amid global challenges, while Bulgaria, Czech Republic, and Poland ramp up high-impact infrastructure investments

The World Bank predicts that Albania's economy will grow by only 2.2% in 2023. Albania's economic growth may be even weaker in 2024 due to the war in Ukraine and the energy crisis deepening and causing an economic downturn in the eurozone, which may increase transportation costs. However, Bulgaria invested in three projects with USD 1.5 billion allocated to Bulgaria's Recovery and Resilience Plan (RRP), along with USD 1.1 billion and USD 431 million from National Funding. This includes the construction of an intermodal regional hub outside of Rousse, which is expected to be finished by 2026.

In 2023, the Czech Republic was expected to open up to 118 km of new highway stretches, including a plan to build over 100 km of highway and 18 km of Class I road. This strategy is expected to reduce traffic congestion, reduce travel time, and improve road safety. The highway and road construction projects may also have a significant economic impact, creating new jobs and boosting the country's economic growth. Improved transportation infrastructure may also enhance accessibility and connectivity, making it easier for businesses to move goods and services across the country.

The Polish government plans to invest USD 17.5 billion in railway infrastructure and USD 36.6 billion in road infrastructure. The key organizations, such as the General Directorate of National Roads and Motorways (GDDKiA), Polish Railway PKP SA, Polish Railway Networks (PKP-PLK), and the Ministry of Economic Development and Technology and the Ministry of Infrastructure, are taking charge of projects spanning across the nation or specific regions.

Post approval from Bulgaria's utilities regulator, gas prices reduced by 30.7%, excluding taxes

Hungary has implemented price regulation measures to keep energy prices low, resulting in one of the lowest gas and electricity prices in Europe. Gas prices in Hungary are available at a reduced unit price of approximately EUR 0.25 (USD 0.26) for up to 1,729 cubic meters per year. On the other hand, Estonia, which has the highest inflation rate in the Eurozone, struggles with rising energy costs, and the government plans to

alleviate the impact on households by freezing excise duty on electricity and fuel until April 2024 and considering other measures, such as reducing taxes on fuels.

In 2021, the price of natural gas increased by 49.41%, up from 2020. The price of natural gas increased by almost seven times, and coal prices quadrupled due to the Russian-Ukraine War, leading to an unstable energy situation and increased consumer price inflation, particularly in the Baltic countries of Estonia, Lithuania, and Latvia. In June 2023, Estonia recorded the highest gasoline prices among Central and Eastern European countries, at 1.84 USD per liter, followed by Albania at 1.79 USD/liter.

In 2023, Bulgaria's utilities regulator gave its approval for a reduction of 30.7% in the regulated gas price for February, resulting in a new price of BGN 124.34 (USD 67.8) per MWh (excluding transportation costs, excise, and value-added tax). The price reduction is attributed to the lower prices in international gas markets, owing to warm weather and sufficient gas storage in Europe. This price reduction is expected to benefit significant consumers, and the regulator has decided to maintain central heating prices for the rest of the winter heating season.

Central and Eastern Europe Courier, Express, and Parcel (CEP) Industry Overview

The Central and Eastern Europe Courier, Express, and Parcel (CEP) Market is fragmented, with the top five companies occupying 31.80%. The major players in this market are DHL Group, FedEx, InPost, La Poste Group and Poczta Polska SA (sorted alphabetically).

Additional Benefits:

The market estimate (ME) sheet in Excel format

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