

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

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## Abstracts

The Europe Courier, Express, and Parcel (CEP) Market size is estimated at 133.94 billion USD in 2024, and is expected to reach 167.94 billion USD by 2030, growing at a CAGR of 3.84% during the forecast period (2024-2030).

Increasing demand for the parcel market owing to e-commerce purchases of goods under fashion and electronics industries

The parcel market has been witnessing growth owing to e-commerce in the region. For instance, e-commerce is expected to grow in Germany, wherein online population is projected to touch 68.4 million in 2025. Clothing items (76% online buyers) and shoes (73%) are the most purchased online goods via e-commerce in Germany, driving CEP market demand. Also, Amazon collaborated with 25,000 Italian SMEs in 2022 to provide investments and digital resources to take businesses online for internationalization. In addition, in 2021, 21,000 Italian SMEs sold products via Amazon, wherein export sales accounted for USD 849 million, of which USD 64 million were registered outside the EU.

In Spain, the most popular product categories for e-commerce orders in 2021 that drove CEP demand were home products (67%), followed by electronics (65%), fashion items (57%), and books and movies (55%). In addition, e-commerce sales for products in the fashion industry in France are expected to account for one-third of the total apparel sales in France by 2025, thus significantly generating CEP demand.

The most common goods purchased online by UK consumers in 2022 were fashion

goods, with clothing accounting for a 63% share and shoes for a 47% share. These were followed by consumer electronics, with a 35% share, and books, movies, and games, with a 33% share in 2022. All these item deliveries collectively drove CEP demand. In alignment with this, Royal Mail, the national postal service, is aiming to have 5,500 electric vans by the end of 2023 in a further effort to reduce carbon emissions. Amazon also started on-foot and electric cargo bike delivery in London in 2022. Initiatives by both companies are a part of their commitment toward all shipments having net-zero carbon emissions by 2040.

## E-commerce growth drives warehouse demand, attracts USD 8.38 billion in investments in 2022

In 2020, the international parcel services traffic volume in Europe surpassed 2.7 billion parcels. Moreover, in the second half of 2021, 71.8% of European imports from outside the EU were from China, significantly contributing to the demand for parcel services. The popularity of Chinese imports in European markets has steadily increased due to their competitive pricing and extensive product options. This surge in popularity has led to an increase in the proportion of Chinese goods imported into the continent, rising from 65.56% in the second quarter of 2021 to its current level.

E-commerce has emerged as a significant driving force in the market, propelling growth across various segments. In 2022, the fashion segment dominated B2C sales, accounting for the highest share contribution of 28.29%, followed by electronics with a share contribution of 17.08%. The market has exhibited robust performance in the past, showcasing positive growth trends. In 2021, online marketplaces played a pivotal role in B2C e-commerce revenue generation in Germany, contributing to approximately 51% of the total.

The rapid expansion of e-commerce and global trade has sparked a significant increase in the demand for warehousing and fulfillment centers. In 2022, the market witnessed the creation of 6.67 million sq. m of logistics, warehouse, and industrial space through new leases and owner-occupancy. The investment transaction volume for logistics and industrial properties reached a substantial USD 8.38 billion by the third quarter of 2022. Furthermore, the average prime rents for logistics properties in Germany experienced a noteworthy 26% increase in the 12 months ending in Q3 2022.

## Europe Courier, Express, and Parcel (CEP) Market Trends

European Union allocated USD 5.76 billion to 135 transportation projects to boost economic recovery

In Europe, the GDP of the transport and storage sector rose by 10.48% in 2021 due to a rise in trade and travel. In 2022, around 135 transport infrastructure projects were selected for EU grants totaling USD 6 billion. The transportation and warehouse sector plays a crucial role in supporting operations across various industries, with Germany leading as the dominant player, surpassing France and the United Kingdom. Globally, Germany ranks third in both imports and exports of goods. The German federal government expressed its intention to increase investments in transportation infrastructure, allocating over EUR 12 billion (USD 12.80 billion) for federal highways and around EUR 1.7 billion (USD 1.81 billion) for waterways in 2022, thereby demonstrating its commitment to improving transportation networks.

The German government intends to invest more in rail than roads. In 2022, Deutsche Bahn, the federal government, and the local and regional governments invested roughly EUR 13.6 billion (USD 14.51 billion) in rail infrastructure projects. Lower Saxony, Hamburg, Bremen, Mecklenburg-Western Pomerania, and Schleswig-Holstein are partnering with DB to invest in modernizing their rail network by 2030.

In 2022, the European Union approved EUR 5.4 billion through grants for approximately 135 transport infrastructural projects. These projects aim to aid post-pandemic economic recovery in the EU Member States, enhance transport links, promote sustainable transportation, boost safety, and create job opportunities. All supported projects are part of the Trans-European Transport Network, which connects EU Member States and aligns with the European Union's goal of completing the TEN-T core network by 2030 and the comprehensive network by 2050.

Since February 2023, diesel imports from the Middle East, Asia, and North America have increased due to the ban on imports from Russia

Gasoline prices surpassed EUR 2 (USD 2.13) per liter in most of the 19 eurozone countries in Q1 2022. The main reason behind the increased prices was supply issues due to the conflict between Russia and Ukraine, as Russia supplied more than a quarter of the EU's petroleum needs. In 2021, the average price for a liter of gasoline in the eurozone was EUR 1.30 (USD 1.38); at the start of 2022, the price was about EUR 1.55

(USD 1.65) per liter.

Russia has been Europe's largest supplier of diesel. In 2023, diesel prices declined in Europe. Since February 2023, when the European Union implemented the ban on petroleum product imports from Russia, diesel exports from Russia to Europe have averaged 24,000 barrels per day (b/d), down by 96% from the 630,000 b/d Russia sent to Europe in 2022. From February through May, diesel exports to Europe increased by 51% (160,000 b/d) from the Middle East, by 97% (147,000 b/d) from Asia, and by 65% (47,000 b/d) from North America.

Denmark is the most expensive country for petrol, and Finland is the most expensive for diesel. Austria has the cheapest petrol, and Spain is the cheapest for diesel. Fuel prices in the United Kingdom reached record highs in 2022, with the average price of petrol hitting USD 245.55 per liter and diesel reaching USD 251.79 per liter in July. The average cost of petrol at UK forecourts has risen to break 150 p a liter (USD 1.88.02) since the start of 2023, and diesel has risen to 152.41p a liter (USD 191.04). Spanish fuel prices were lower than in the United Kingdom by about 20 cents per liter for petrol and 40 cents per liter for diesel in January 2023.

## Europe Courier, Express, and Parcel (CEP) Industry Overview

The Europe Courier, Express, and Parcel (CEP) Market is moderately consolidated, with the top five companies occupying 50.58%. The major players in this market are DHL Group, FedEx, International Distributions Services (including GLS), La Poste Group and United Parcel Service of America, Inc. (UPS) (sorted alphabetically).

Additional Benefits:

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