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Europe Domestic Courier - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2024 - 2030)

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Abstracts

The Europe Domestic Courier Market size is estimated at 88.49 billion USD in 2024, and is expected to reach 110.46 billion USD by 2030, growing at a CAGR of 3.76% during the forecast period (2024-2030).

E-commerce companies are expanding their networks in Europe to provide better services to customers

Domestic courier services are becoming increasingly important in the e-commerce industry as consumers expect their orders to arrive quickly and conveniently. The pandemic brought a drastic change in shopping behavior over the past years, shifting the shopping process toward online shopping. Moreover, e-commerce companies are expanding their networks in Europe to provide better services to customers. For instance, the Spanish retailer DIA is expanding its delivery services to all towns along the Spanish coastline, from Girona to Huelva, reaching more than 5 million new customers.

In 2022, Portugal, Turkey, and Poland had the highest rise in sales in terms of volume in Europe at 13.3%, 10.2%, and 10.1%, respectively. In 2021, retail spending constituted a large proportion of private consumption in all European countries, i.e., typically between 30% and 50%. The German market in Europe was the largest and most important retail market in terms of turnover. After Germany, the largest economies in Europe were France, the United Kingdom, and Italy, the major demand generators for domestic courier services.

Courier services for healthcare products are expected to grow in the coming years in the region due to several factors, including the increasing demand for medical supplies, rising healthcare spending, and the need for faster and more efficient delivery services. Also, From 2023 onward, it is expected that the total retail sales in Europe-5 countries (Germany, the United Kingdom, France, Italy, and Spain) will grow at pre-pandemic levels and drive the growth of the market. As a result, the European domestic courier market is expected to grow positively during the forecast period.

Italy's domestic delivery demand fuels CEP growth, revenue hits USD 11.6 billion with 22% increase

Germany's parcel service providers moved a volume of 725 million parcels during the Christmas period in 2022. B2C parcel shipments were the largest segment, with 395 million parcels delivered to private recipients. On average, deliveries included 20 million shipments per day during peak times and 14.5 million parcels daily, including 8 million to private residences. The demand for domestic CEP in the German market is expected to increase due to the projected growth of e-commerce at a rate of 9.36% from 2023 to 2027.

The e-commerce segment is expected to be the primary driver of growth in the French domestic courier market. In 2022, the French domestic courier market was valued at approximately USD 83 billion, and it is projected to reach USD 152 billion by 2027. The increased demand in e-commerce has led to significant parcel deliveries, with France's national postal service, La Poste Group, alone delivering 2.6 billion parcels in 2022. Other significant players in the French CEP market, such as DHL Global Forwarding France SAS, General Logistics Systems France SA, and United Parcel Services France SAS, also make substantial contributions.

Domestic delivery demand plays a major role in driving CEP deliveries in Italy. Revenue from CEP also experienced a significant increase, rising by 22% to USD 11.6 billion in 2021 from USD 9.6 billion in 2020. The number of parcels delivered per person also grew, rising from 21 in 2020 to 24 in 2021, representing a 17% increase. This resulted in households receiving 55 parcels on average.

Europe Domestic Courier Market Trends

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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 rise by 10.48% in 2021 due to 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.

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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 Domestic Courier Industry Overview

The Europe Domestic Courier Market is fragmented, with the top five companies occupying 36.18%. The major players in this market are DHL Group, International Distributions Services (including GLS), La Poste Group, Post NL and United Parcel Service of America, Inc. (UPS) (sorted alphabetically).

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