

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

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Abstracts

The France Courier, Express, and Parcel (CEP) Market size is estimated at 17.91 billion USD in 2024, and is expected to reach 22.77 billion USD by 2030, growing at a CAGR of 4.08% during the forecast period (2024-2030).

Infrastructure, e-commerce, and investments are driving the CEP market's growth

The presence of a significant number of pick-up and drop-off points for couriers and parcels played a major role in facilitating efficient CEP deliveries in France. Some of the largest CEP delivery providers have the most number of pick-up and drop-off points in the country. For instance, La Poste Group, the national courier service, had the highest number of pick-up and drop-off points (24,000) as of 2022, followed by Mondial Relay and General Logistics Systems (GLS) with 11,000 points combined. The number of CEP pick-up and drop-off points is further expected to go up, with e-commerce reaching about USD 107 billion by 2027 in France, owing to growth in e-commerce, which is a major CEP demand driver.

The lockdowns during the pandemic contributed to the demand for domestic and international CEP deliveries in 2020, with the number of parcels produced per person increasing in 2020, up from 2019. The courier, express, and parcel demand remained stable in 2021, owing to the continuing trend of ordering online. Thus, major demand was generated via e-commerce and the domestic CEP market grew at a CAGR of 1.92% from 2017-2021.

French customers are also more likely to make more online purchases in comparison to an average European customer, thus further facilitating the growth of the domestic and international CEP market. For instance, the number of e-commerce users in France is expected to reach 51.5 million by 2025. E-commerce sales for the fashion industry are expected to account for one-third of the total apparel sales in France by 2025, making it one of the largest e-commerce markets in France. This projected growth for e-commerce users and the fashion segment is expected to largely increase the demand for domestic and international CEP deliveries in France.

France Courier, Express, and Parcel (CEP) Market Trends

France is boosting its logistics industry with USD 1.06 billion investments toward road modernization

In transportation strategy, France planned to allocate EUR 5.1 billion (USD 5.44 billion) for highway maintenance and construction endeavors in 2022. This financial commitment to highways constitutes the larger portion, EUR 13.4 billion (USD 14.30 billion), dedicated to overall transportation investments as pledged by the government. Notably, most of these funds will be directed toward railway projects. The French government also unveiled its infrastructure spending priorities for the ten years concluding in 2028.

As of March 2022, the transport and logistics industry encompassed approximately 397,000 operational enterprises, constituting 3.6% of the metropolitan business landscape. This sector employed 5.1% of the workforce and contributed 4.3% to the combined turnover. This expansion is notably attributed to the surge in e-commerce activities within the country. The projected outcome for the transportation and storage sector's revenue in 2022 was an estimated USD 266.50 billion.

France has the best logistics for trading across borders. It has Europe's second-largest rail network, with 30,000 km (18,650 miles) of track and 1 million kilometers (620,000 miles) of road. Europe has the largest road network to maintain this. In May, the French government announced plans to increase the annual national road modernization fund by 25% to EUR 1 billion (USD 1.06 billion). Roads will be reviewed every five years beginning in 2022, using a new scoring system to determine which needs the most repairs and modernization. The roads that serve mid-sized cities are expected to be prioritized.

Shortage of fuel in France is leading to rising fuel prices due to distribution issues caused by refinery strikes

In January 2022, a liter of diesel was worth USD 1.65, which was five cents higher than the value recorded in December 2021 and three cents higher than the value recorded in October 2018. The price of diesel mostly depends on the quality and supply rate of crude oil, increases in the cost of barrels of crude oil in France, and distribution issues caused by continuing refinery strikes. French petrol stations faced a shortage of fuel, which resulted in increased fuel prices and reduced subsidies for petrol and diesel. When truck drivers pay at the pump, they are charged the full price after a discount.

In the second week of August 2021, a liter of diesel was worth USD 1.49, while super-unleaded petrol was valued at USD 1.66. The price of fuel rose quickly in France during the first month of 2022 and reached a record level. As of May 2023, the average price of a liter of diesel in France was EUR 1.72 (USD 1.83), while petrol was priced at EUR 1.91 (USD 2.03) per liter.

The prices of oil have been accelerating since 2020. The consumption of E85 oil recorded a 53% rise during May 2021-April 2022 compared to the same period during 2020-2021. The rise in fuel prices due to Russia's invasion of Ukraine prompted cost-conscious motorists to turn to alternative fuel sources, with E85, a mixture of gasoline and up to 85% bioethanol, which recorded a high demand in France. In 2022, super ethanol (E85) represented 6.2% of the French fuel market, thereby doubling its market share from what it was in 2020. France, an agricultural powerhouse, is one of the strongest proponents of ethanol in the European Union. The French government offers a reduced fuel tax on E85 and a regulatory approach that incentivizes the sale of high-ethanol fuel blends.

France Courier, Express, and Parcel (CEP) Industry Overview

The France Courier, Express, and Parcel (CEP) Market is moderately consolidated, with the top five companies occupying 60.98%. The major players in this market are FedEx, GEODIS, International Distributions Services (including GLS), La Poste Group and United Parcel Service of America, Inc. (UPS) (sorted alphabetically).

Additional Benefits:

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Contents

1 EXECUTIVE SUMMARY & KEY FINDINGS

2 REPORT OFFERS

3 INTRODUCTION

3.1 Study Assumptions & Market Definition

3.2 Scope of the Study?

3.3 Research Methodology

4 KEY INDUSTRY TRENDS

4.1 Demographics

4.2 GDP Distribution By Economic Activity

4.3 GDP Growth By Economic Activity

4.4 Inflation

4.5 Economic Performance And Profile

4.5.1 Trends in E-Commerce Industry

4.5.2 Trends in Manufacturing Industry

4.6 Transport And Storage Sector GDP

4.7 Export Trends

4.8 Import Trends

4.9 Fuel Price

4.10 Logistics Performance

4.11 Infrastructure

4.12 Regulatory Framework

4.12.1 France

4.13 Value Chain & Distribution Channel Analysis

5 MARKET SEGMENTATION (INCLUDES MARKET VALUE IN USD, FORECASTS UP TO 2030 AND ANALYSIS OF GROWTH PROSPECTS)

5.1 Destination

5.1.1 Domestic

5.1.2 International

5.2 Speed Of Delivery

5.2.1 Express

- 5.2.2 Non-Express
- 5.3 Model
 - 5.3.1 Business-to-Business (B2B)
 - 5.3.2 Business-to-Consumer (B2C)
 - 5.3.3 Consumer-to-Consumer (C2C)
- 5.4 Shipment Weight
 - 5.4.1 Heavy Weight Shipments
 - 5.4.2 Light Weight Shipments
 - 5.4.3 Medium Weight Shipments
- 5.5 Mode Of Transport
 - 5.5.1 Air
 - 5.5.2 Road
 - 5.5.3 Others
- 5.6 End User Industry
 - 5.6.1 E-Commerce
 - 5.6.2 Financial Services (BFSI)
 - 5.6.3 Healthcare
 - 5.6.4 Manufacturing
 - 5.6.5 Primary Industry
 - 5.6.6 Wholesale and Retail Trade (Offline)
 - 5.6.7 Others

6 COMPETITIVE LANDSCAPE

- 6.1 Key Strategic Moves
- 6.2 Market Share Analysis
- 6.3 Company Landscape
- 6.4 Company Profiles
 - 6.4.1 DHL Group
 - 6.4.2 FedEx
 - 6.4.3 GEODIS
 - 6.4.4 Integer.pl Capital Group
 - 6.4.5 International Distributions Services (including GLS)
 - 6.4.6 La Poste Group
 - 6.4.7 Logista
 - 6.4.8 Sterne Group
 - 6.4.9 United Parcel Service of America, Inc. (UPS)
 - 6.4.10 Walden Group

7 KEY STRATEGIC QUESTIONS FOR CEP CEOS

8 APPENDIX

8.1 Global Overview

8.1.1 Overview

8.1.2 Porter's Five Forces Framework

8.1.3 Global Value Chain Analysis

8.1.4 Market Dynamics (DROs)

8.1.5 Technological Advancements

8.2 Sources & References

8.3 List of Tables & Figures

8.4 Primary Insights

8.5 Data Pack

8.6 Glossary of Terms

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