

Germany Same Day Delivery - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2024 - 2030)

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Abstracts

The Germany Same Day Delivery Market size is estimated at 2.21 billion USD in 2024, and is expected to reach 2.89 billion USD by 2030, growing at a CAGR of 4.56% during the forecast period (2024-2030).

Expansion of same day delivery services for groceries, coupled with sustainability initiatives, driving growth

Same-day delivery for groceries is one of the segments generating some of the highest share of CEP same-day delivery demand. As 69% of consumers in Germany expected same-day deliveries for groceries in 2022, companies have been capitalizing on this opportunity for expansion. For instance, the German retailer REWE expanded its grocery delivery services to Nuremberg in 2022, specifically for same-day delivery services. Also, Flink, a Germany-based grocery delivery startup, raised USD 240 million in 2021 to expand services of on-demand and instant deliveries of groceries in the country. In addition, 28.40 million consumers are expected in the category of grocery delivery by 2027, specifically for same-day delivery, further accelerating the demand.

The tendency of more German online customers to place a high value on sustainable ideas regarding parcel delivery with the requested goods has significantly increased. In 2019, 66% of consumers in Germany opted for companies and retailers while making online purchases that upheld good environmental practices. Thus, this increases the need for sustainable practices in domestic, international same day, and last mile deliveries in Germany.

Sporting goods delivery also contributes to the CEP delivery demand in Germany. In alignment, sporting goods retailer, Decathlon.de in Germany, which generated over USD 200 million in 2022 and is expecting to more than double its sales by 2026, is also venturing to explore a sustainable same-day delivery market. The company partnered with a logistics firm called Glocally in 2022, which focuses on a sustainable supply chain specifically for same-day deliveries. The company can facilitate deliveries from the Munich-Elisenhof store to more than 30 zip codes via electrically powered cargo bikes.

Germany Same Day Delivery Market Trends

Germany leads European logistics and transportation with USD12.80 billion investment in highways in 2022

The German transportation industry is key to maintaining well-functioning services and moving goods within and outside the nation. The country has some of the highest-ranked infrastructural networks in the world, with its roads being some of the more heavily traveled thoroughfares in Europe. Transportation and storage recorded a high growth rate of 6.80% YoY in March 2022 and a low rate of -1.60% YoY in March 2021 due to the recovery from the pandemic and the resumption of trade with foreign countries.

The transportation and warehouse sector's significance extends to the facilitation of operations in various other industries. Germany asserts its dominance, surpassing even the second and third-largest logistics markets, namely France and the United Kingdom. Globally, Germany holds the esteemed rank of being the third-largest both in terms of imports and exports of goods. The German federal government articulated its plans to augment investments in transportation infrastructure, signaling a commitment to allocate additional funds in 2022. This commitment materialized through an allocation exceeding EUR 12 billion (USD 12.80 billion) for federal highways and approximately EUR 1.7 billion (USD 1.81 billion) for waterways in the same year.

The German government intends to invest more in rail than roads to promote environmental protection, sustainability, and effective transportation. 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. Lower Saxony, Hamburg, Bremen, Mecklenburg-Western Pomerania, and Schleswig-Holstein, together with DB,

invested in modernizing their rail networks by 2030.

Fuel prices in Germany have been rising rapidly owing to high annual inflation rate

In January 2022, Germany's daily average diesel price was USD 1.66 per liter, almost 37 cents (USD 0.37) more than the average monthly diesel price in January 2021. The price of E10 premium petrol also followed a similar trend. In January 2022, it cost USD 1.84 a liter, 32 cents (USD 0.32) cheaper compared to January 2021. The price hike for diesel and E10 fuels can be attributed to rising oil prices. Crude oil price indicators WTI and Brent Crude hit seven-year high in 2022.

Transport prices on Europe's roads reached an all-time high in Q4 2021, the sixth consecutive quarter recording an increase in freight rates. On the carrier side, the biggest drivers behind this development were rising fuel costs, up by 25% YoY in Germany. However, petrol and diesel fuel were more expensive in Germany than in the rest of the European Union. As the discount on fuel expired, motor fuel prices in Germany increased, with filling stations charging more for petrol and diesel fuel than those in all the EU countries bordering Germany.

German consumers faced the fastest price rise, and the high annual inflation rate was primarily driven by extreme price increases for energy and groceries since the Russia-Ukraine War. Germany is among the world's biggest natural gas importers. Around 95% of its gas consumption is met by imports. In 2022, 55% of gas imports came from Russia, 30% from Norway, and 13% from the Netherlands. The prices of heating oil (up 87%) and natural gas (up 64.8%) increased the most, while electricity prices rose by 20.1%. Petroleum and diesel prices at the pump increased by 26.8% for drivers.

Germany Same-day Delivery Industry Overview

The Germany Same Day Delivery Market is moderately consolidated, with the top five companies occupying 41.18%. 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).

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