

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

<https://marketpublishers.com/r/N020FAC90162EN.html>

Date: July 2024

Pages: 301

Price: US\$ 4,750.00 (Single User License)

ID: N020FAC90162EN

Abstracts

The Netherlands Courier, Express, and Parcel (CEP) Market size is estimated at 9.07 billion USD in 2024, and is expected to reach 12.12 billion USD by 2030, growing at a CAGR of 4.95% during the forecast period (2024-2030).

Rising demand for domestic and international CEP services leading to expansion and improvements of delivery services

The postal & courier activities industry in the Netherlands ranked fourth in Europe in 2022 (out of 25 total EU countries). The industry's rank (fourth) has remained the same since 2017. As of 2022, there were 10,070 businesses engaged in postal & courier activities in the Netherlands, which was an increase of 5% from 2021. The presence of more CEP services is predicted as CEP values are expected to register a CAGR of 5.09% during 2023-2029 owing to rising demand. In 2020, UPS had the highest market share in cross-border parcel transport in the Netherlands, with 45%, whereas DPD's market share amounted to 15%. PostNL, which dominates the domestic postal and parcel services, had a market share of roughly 20%.

Parcel deliveries in the country had an average transit time of 1.7 days in 2021, owing to an increase in parcel volumes throughout the year. Around 95.2% of domestic parcels in the Netherlands were successfully delivered on the first attempt in 2021, resulting in a marginal increase since H2 2020. The popularity of collection points has been progressively growing in the Netherlands, though customers are still more receptive toward doorstep deliveries.

E-commerce is a main driver of demand for domestic and international CEP services in the country, with e-commerce revenue projected to reach USD 26.35 billion in 2023. The revenue is expected to show further growth to reach a projected market value of USD 36.75 billion by 2027. The number of users in the e-commerce industry is expected to amount to 13.4 million users by 2025, thus leading to increased CEP service demand.

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

The Dutch government's USD 8 billion transportation investment plan focus on public transit and road infrastructure

The transportation and storage sectors in the Netherlands saw a substantial increase, rising from a 14.53% YoY growth in 2021 to 24.81% in 2022 due to a rise in sea trade freight volume. In the third quarter of 2022, the transportation sector's GDP in the Netherlands surged to EUR 8.74 billion (USD 9.32 billion), a significant rise from EUR 884 million (USD 943.66 million) recorded in the second quarter. The Netherlands, known for its strong export activities, plays a crucial role in shipping substantial freight volumes through its road and rail networks.

In the fourth quarter of 2021, the transport sector witnessed substantial growth, with a remarkable 24% increase in turnover compared to the same period in the previous year. This surge in turnover was evident across all market segments, except for postal and courier services. Notably, water transport experienced a remarkable upswing, with a growth rate of over 30% compared to the previous year. This increase was particularly notable in both seagoing and inland shipping, primarily driven by the impact of rising prices in the sector.

The Dutch government has outlined an ambitious plan to enhance transportation systems with a substantial investment of EUR 7.5 billion (USD 8.00 billion) over the next decade until 2030. The national government is slated to allocate EUR 4 billion (USD 4.26 billion) toward advancing public transportation endeavors. This encompasses extending Amsterdam's North-South Metro Line to Schiphol alongside a significant commitment of EUR 2.7 billion (USD 2.88 billion) for road enhancements. Additionally, an investment of EUR 780 million (USD 832.64 million) is earmarked for infrastructure upgrades to augment the network of bike lanes across the country.

Discount on fuel duty was introduced in 2022 after fuel prices surged in response to a spike in oil and gas prices globally

In 2022, the petrol price rose above USD 1.8 per liter due to the war in Ukraine and the economic recovery after the coronavirus crisis a barrel of crude oil costs around USD 100. The crude oil price and refining costs account for roughly 30% of the pay at the pump. The fuel price in the Netherlands is in despair as petrol prices continue to rise across the country, including the cost incurred by oil companies, gas stations, and shops. The tax relief, worth 13.8 cents (USD 0.138) for a liter of petrol and 10 cents (USD 0.10) for diesel, was introduced in 2022 after prices surged to around 2.45 cents (USD 0.0245) and 2.14 cents (USD 0.0214), respectively, in response to a spike in oil and gas prices on global markets.

The average price in December 2021 was more than USD 2.10 per liter. At the beginning of 2021, this was still about USD 1.8. The highest level was reached in November when the liter price peaked at a record USD 2.2. The prices of LPG and diesel also went to unprecedented levels in 2021. The demand for fuel prices increased after the global economy recovered from the coronavirus crisis.

The petrol price in the Netherlands is more expensive than in almost all other countries due to excise duties. It is, therefore, a huge source of income for the state. The Netherlands has eight million motorists and around USD 4.7 billion in fuel excise and VAT annually. Prices have been steadily falling across Europe since the beginning of 2022, attributed to falling oil prices and the weakening global economy. The petrol prices continue to fall at a rapid pace. In January 2023, petrol prices surged by around 14 cents (USD 0.14) a liter when the discount on fuel duty introduced in 2022 ended.

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

The Netherlands Courier, Express, and Parcel (CEP) Market is fairly consolidated, with the top five companies occupying 70.35%. The major players in this market are DHL Group, FedEx, La Poste Group, Post NL and United Parcel Service of America, Inc. (UPS) (sorted alphabetically).

Additional Benefits:

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