

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

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## Abstracts

The Nordics Courier, Express, and Parcel (CEP) Market size is estimated at 7.22 billion USD in 2024, and is expected to reach 9.34 billion USD by 2030, growing at a CAGR of 4.37% during the forecast period (2024-2030).

Rising demand for CEP deliveries owing to e-commerce, specifically for goods like grocery, pharmaceuticals, and beauty products

As of 2022, the courier, express, and parcel (CEP) market was growing at a robust rate, and the domestic segment of the courier, express, and parcel market had a larger contribution compared to the international segment. The key factors driving the CEP market are the e-commerce industry, both domestic and cross-border, and the surge in B2C deliveries. E-commerce is also expected to touch USD 51 billion by 2025 potentially contributing to significant growth of the CEP market.

As of 2021, in Sweden, the total turnover of the CEP market was approximately USD 13 billion, of which B2C accounted for USD 7.2 billion, B2B accounted for USD 5.3 billion, and C2X accounted for USD 488 million. Also, a total of around 227 million traditional parcels were sent, of which 150 million were B2C parcels, 69 million were B2B parcels, and about 7.5 million were C2X parcels. PostNord is the largest player in the B2C parcels market, with a market share of 60% in terms of turnover, followed by DHL with a market share of 15% and DB Schenker, Instabox, and Budbee, each with 5-10% of the market.

The e-commerce industry has been one of the major driving factors of the CEP market. The revenue of the e-commerce industry reached USD 37.55 billion in 2022. A significant factor driving e-commerce growth in the Nordics is the increase in regular, recurrent purchases, such as grocery, pharmaceuticals, and beauty products. These high-frequency purchases provided a permanent boost to monthly e-commerce acquisitions. As a result, the CEP market is expected to boom in the future, with the value of e-commerce projected to reach USD 55.97 billion in 2027.

Nordic nations drive global e-commerce surge, sweden leads with 43% of cross-border sales

As of 2022, cross-border online shopping has gained significant traction in Nordic countries, with over a third of online consumer orders originating from abroad. In total, these cross-border shoppers have spent approximately USD 3.81 billion on purchases from foreign websites. The region is projected to witness a substantial increase in the number of e-commerce users, reaching 21.21 million by 2027, with a user penetration rate of 74.5%. This growing user base is likely to drive a further surge in demand for international courier, express, and parcel (CEP) services.

In 2022, the wholesale and retail trade end-user segment dominated the international CEP market, accounting for approximately 55.52% of the total revenue share. The Nordic countries are experiencing a surge in cross-border business-to-consumer (B2C) e-commerce, with Sweden leading among them, capturing 43% of the total market share for foreign B2C e-commerce. The e-commerce market in the Nordics witnessed growth from USD 45.95 billion in 2021 to USD 51.35 billion in 2022. These countries have observed a notable increase in online purchases made on foreign websites.

The road freight transport market in the Nordic region experienced growth, reaching a value of USD 13.7 billion in 2022 compared to USD 13.2 billion in 2021. In 2022, road freight transport constituted 67% of the total inland freight transport in the Nordic region. In 2021, the overall volume of road freight transport in the Nordic region amounted to approximately 94.27 billion ton-kilometers. The domestic volumes accounted for around 65.46 billion ton-kilometers, while international volumes accounted for approximately 24.39 billion ton-kilometers.

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

Sweden's port of Gothenburg leads with 51% market share handling 828,000 TEUs

The Nordic transportation and storage sector saw a substantial YoY increase, rising from 11.57% to 19.71%, due to Nordic countries' strong rankings in the Logistic Performance Index and their excellent trade infrastructure. Among these nations, Sweden stands out as the primary contributor to the sector's GDP. Sweden's robust high-income economy has fostered a modern and technologically advanced transportation industry, with Gothenburg emerging as a prominent logistics hub, supported by the Port of Gothenburg and new logistics facilities. The Port of Gothenburg, Sweden's largest, has consistently gained a larger market share, growing from 48% to 51% in 2021 and handling 828,000 TEUs.

The expansion of cold storage is due to the expansion of the global or European trade market. Companies are relying more on cold storage warehouses to extend the life of a product. However, the logistics market in Sweden is the largest in the Scandinavia region. Investments in infrastructure have made the country one of the top logistics markets in Europe. GDP (nominal) from transport in Sweden increased to USD 4.62 billion in the first quarter of 2022 from USD 4.47 billion in the fourth quarter of 2021.

The Danish government has unveiled Denmark Forward, a new plan to invest DKK 160 billion (USD 22.96 billion) in infrastructure through 2035. The plan is in place to improve the national road and railway systems, which will benefit both people and businesses. In recent years, Norway's public investment in transportation has significantly increased, which could have significant economic benefits, especially since good transportation infrastructure can aid in Norway's transition away from oil-related activities. However, effective methods for choosing and completing projects are needed in order to realize these gains.

Owing to the impact of the Russia-Ukraine war on fuel prices globally, fuel prices in the Nordic countries are rapidly increasing

In 2021, a liter of diesel was more expensive in Sweden, from SEK 0.15 (USD 0.014) increase to SEK 19.37 (USD 1.85). The reason for the hikes was a global rise in market prices for oil, which is currently at a three-year high. Diesel was particularly affected because it is an expensive fossil fuel with more biofuels than others and due to policies aimed at protecting the environment. In 2022, the price continuously increased due to the increased demand for diesel. The Ukraine-Russia war also impacted the fuel price

globally however, the government has adopted a reduced energy tax on diesel and gasoline.

The average value for gasoline in Finland from May to August 2022 was EUR 2.33 (USD 2.48), with a minimum of EUR 2.11 (USD 2.25) on August 15, 2022, and a maximum of EUR 2.54 (USD 2.71) on June 13, 2022. The average value for gasoline in Denmark from May to August 2022 was DKK 17.29 (USD 2.48), with a minimum of DKK 15.47 (USD 2.22) on August 8, 2022, and a maximum of DKK 18.97 (USD 2.72) on June 6, 2022. The average value for gasoline in Iceland from May to August 2022 was ISK 330.43 (USD 2.32), with a minimum of ISK 303.34 (USD 2.13) on May 9, 2022, and a maximum of ISK 345.71 (USD 2.43) on June 13, 2022.

The average value for gasoline in Sweden from May to August 2022 was SEK 22.06 (USD 2.11), with a minimum of SEK 19.94 (USD 1.90) on August 1, 2022, and a maximum of SEK 24.14 (USD 2.31) on June 6, 2022. The average value for gasoline in Norway from May to August 2022 was NOK 24.63 (USD 2.35), with a minimum of NOK 21.71 (USD 2.07) on April 25, 2022, and a maximum of NOK 26.93 (USD 2.57) on June 6, 2022.

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

The Nordics Courier, Express, and Parcel (CEP) Market is moderately consolidated, with the top five companies occupying 53.80%. The major players in this market are DHL Group, FedEx, Posten Bring AS, PostNord and United Parcel Service of America, Inc. (UPS) (sorted alphabetically).

Additional Benefits:

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