

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

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Abstracts

The United Kingdom Courier, Express, and Parcel (CEP) Market size is estimated at 17.13 billion USD in 2024, and is expected to reach 20.87 billion USD by 2030, growing at a CAGR of 3.35% during the forecast period (2024-2030).

Growing carbon footprint reduction initiatives owing to increasing e-commerce CEP orders are expected to positively impact CEP industry

The e-commerce industry is a leading driver of growth in the domestic and international CEP segments, and the industry's value is expected to register a CAGR of 3.50% from 2023 to 2029. The most common goods purchased online by UK consumers in 2022 were fashion goods, with clothing accounting for a 63% share and shoes for a 47% share. These were followed by consumer electronics, with a 35% share, and books, movies, and games, with a 33% share in 2022. All these item deliveries collectively drove CEP demand in the United Kingdom.

The top parcel delivery companies in the United Kingdom consist of Royal Mail, Amazon Logistics, Hermes Parcelnet, United Postal Service (UPS), DHL, and DPD Group UK. Other companies in the market include APC Overnight, City Link, Parcellforce, Schenker, TNT, Tuffnells, Whistl, and Yodel. The top five carriers in the country alone accounted for 75% of UK parcel shipments by volume. In 2021, Royal Mail held the highest share of the UK courier market. Meanwhile, with a market share of 15%, Amazon Logistics is emerging as a significant player in the UK parcel market.

CEP companies with some of the biggest market shares are taking significant steps to reduce the carbon footprint generated by delivering huge volumes of parcels. For instance, Royal Mail has allowed 90,000 posties to make on-foot deliveries. Two-thirds of the deliveries are made purely by foot or through a 'park and loop' method, which is mostly on foot. The company is also aiming to have 5,500 electric vans by 2023 in a further effort to reduce carbon emissions. Amazon also started on-foot and electric cargo bike delivery in London in 2022. Initiatives by both companies are a part of their commitment toward all shipments having net-zero carbon emissions by 2040.

United Kingdom Courier, Express, and Parcel (CEP) Market Trends

The UK's warehouse count is expected to reach 214,000 by 2027 due to a rise in demand for consumer fulfillment centers

Russia's invasion of Ukraine in February 2022 suffocated global supply chains, raising inflationary pressures and hastening global discussions about energy security. The UK government increased its investment in new construction and maintenance of national infrastructure for better transportation connectivity and warehousing facilities. In 2022, the government committed GBP 100 billion (USD 120.58 billion) in funding over the next three years, increasing the 'fiscal remit,' which is the funding envelope within which the Commission must budget the recommendations, from 1.1% to 1.3% of the GDP beginning in 2025.

From 2011 to 2021, road freight transportation within the UK transport and storage sector more than doubled in scale, with a growth of around 30,000 local business units. Similarly, the postal and courier segment experienced swift growth, evolving from a modest 17,000 businesses in operation in 2011 to a robust count of 42,000 ten years later. However, a minor decline was observed in 2022, with the country recording 154,665 business units within these sectors.

The number of large warehouses in the United Kingdom is rapidly increasing. By 2027, there are expected to be around 214,000 warehouses larger than 50,000 square feet globally, up from 163,000 in 2021. Many of these warehouses are to serve as e-commerce fulfillment centers, and approximately 18% of all warehouses will be for consumer fulfillment by 2027, rising from the 11% recorded in 2021. This increase suggests the global expansion of e-commerce as the proportion of warehouses operating as trade distribution hubs begins to shift in favor of consumer fulfillment

centers.

UK government has a major influence on fuel prices, and both fuel duty and VAT (standard 20% rate) make up majority of the petrol and diesel prices

The UK Government has a major influence on fuel prices as both fuel duty (currently 52.95 pp) and VAT (standard 20% rate) make up the majority of the price of petrol and diesel. The prices of petrol and diesel in Britain hit a new record high in February 2022. Diesel prices had hit an average of USD 2.36 per liter, while petrol cost was an average of USD 1.91 per liter, both exceeding the previous records set in 2021. With the rise, Britain's inflation soared to a 30-year high of 5.4% in December 2021. In 2022, the fuel price increased during the post-pandemic economic recovery period when the demand for fuel increased and during the Russia-Ukraine War, which affected the demand and supply of fuel.

Diesel prices in the United Kingdom reached a record high in November 2021 after petrol prices hit their highest-ever level, in a blow to households and small businesses. The average price across the United Kingdom on October 31, 2021, was 147.94 pence (USD 0.74) a liter, narrowly surpassing the previous high of 147.93 pence (USD 0.74) set on April 12, 2012. In October 2021, diesel prices rose by 30 pence (USD 0.15) a liter over the previous year, driven higher by a sharp rebound in global oil markets.

In August 2022, the oil price dropped under USD 100 and finished the month at USD 90.63 a barrel. Prices dropped further in 2023, and by May, a barrel of oil was down to USD 72.50. The average cost of petrol at UK forecourts has risen to break 150 p a liter (USD 1.80) for the first time since the start of 2023, and diesel has risen to 152.41 p a liter (USD 1.83). A cold European winter and spring also meant supplies had already been heavily depleted by the summer.

United Kingdom Courier, Express, and Parcel (CEP) Industry Overview

The United Kingdom Courier, Express, and Parcel (CEP) Market is fairly consolidated, with the top five companies occupying 82.54%. The major players in this market are DHL Group, International Distributions Services (including Royal Mail), La Poste Group, United Parcel Service of America, Inc. (UPS) and Yodel (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 United Kingdom

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 APC Overnight
 - 6.4.2 DHL Group
 - 6.4.3 FedEx
 - 6.4.4 GEODIS
 - 6.4.5 International Distributions Services (including Royal Mail)
 - 6.4.6 La Poste Group
 - 6.4.7 Otto GmbH & Co. KG
 - 6.4.8 Rapid Parcel
 - 6.4.9 United Parcel Service of America, Inc. (UPS)
 - 6.4.10 Yodel

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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