

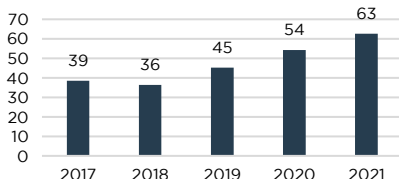
Logistics | Courier, Express, and Parcel

Market Size

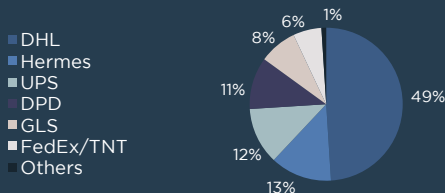
The Courier, Express, and Parcel market (CEP) can be divided into B2B, B2C, C2C segments, end users, domestic or international destinations, and geographic regions.

The growth of the parcel market is expected to slow down after the extraordinary surge experienced during COVID, driven by e-commerce due to high inflation rates, a saturated e-commerce market, and weaker economic conditions.

Annual revenue of the parcel market in Europe in € billion



Market shares of the largest parcel services in Germany in terms of parcel volume in 2022



Source: <https://shop.smurfitwestrock.com/paketversand-paketdienste-dhl-dpd-ups-hermes-gls-im-vergleich, 14.04.2025>

The major parcel service providers' parcel centers in Germany



Source: https://www.bundesnetzagentur.de/SharedDocs/Mediathek/Berichte/2022/Paketmarktbericht2021E.pdf?__blob=publicationFile&v=3, 14.04.2025

Key Trends

- **Online Shopping:** delivery speeds and costs have a strong impact on the purchase decision.
- **Working from Home:** more shipments due to homework increasingly supported by companies.
- **Technology:** increased user convenience through offerings such as mobile tracking, text message, and e-mail notification.

Key Market Driver

- **E-Commerce:** the temporary boom in e-commerce was a major market driver during the pandemic, but the growth is expected to slow down.
- **Globalization:** significant rise in cross-border trade has a positive impact on the market, making shipment easier for all, companies, customers, and service providers.
- **Technology:** operational efficiency and effectiveness through advanced digital technologies, such as delivery lockers, autonomous vehicles, and smart last mile solutions.
- **Sustainability:** competitive advantages of climate-neutral shipping that addresses customers' growing environmental awareness.