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United Kingdom Domestic Courier, Express, and Parcel (Cep) Market - Growth, Trends, Covid-19 Impact, and Forecasts (2023 - 2028)

Market Report | 2023-01-23 | 150 pages | Mordor Intelligence

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Report description:

The UK domestic courier, express, and parcel (CEP) market is expected to register a CAGR of 7% during the forecast period.

The unprecedented outbreak of coronavirus has caused a surge in demand for domestic couriers for residential deliveries, owing to the surge in e-commerce and deliveries of food and groceries, which faced a sudden increase in demand. The coronavirus crisis drove a meteoric rise in online shopping as a result of lockdowns and social-distancing measures that were enacted in response to it. Over 2020-21, forced store closures and social distancing measures encouraged consumers to increasingly turn toward ordering products online and having them delivered through couriers rather than shopping in person. This shift to online is expected to be a more permanent change in consumer behavior.

E-retail has disrupted traditional supply chains. New models are emerging such as Click and Collect use of same-day delivery for consumers and Amazon's delivery network. E-substitution of media (books, music, and films) is reducing the number of small parcels, while the number of the larger parcels from clothing and footwear retailers is growing rapidly.

The UK domestic courier, express, and parcel industry revenue is anticipated to increase over the forecast period as the coronavirus pandemic boosts demand, particularly for medical couriers and retailers. Both these types of couriers are anticipated to be a key growth segment over the forecast period.

UK CEP Market Trends

Increasing E-commerce Penetration is Anticipated to Drive the Market

The United Kingdom is a world leader in e-commerce, and British online shoppers are well-versed in online shopping procedures. Currently, the country's e-commerce industry is ranked third in the global online retail market, trailing only China and the United States. In 2021, its total e-commerce sales value reached an estimated GBP 693 billion, which is greater than the combined value of the e-commerce markets of Germany and France.

Mobile apps account for a significant portion of e-commerce sales in the United Kingdom. Mobile devices are being used to make six out of every ten online purchases. Furthermore, mobile apps appear to be gaining popularity among online shoppers, as they accounted for 45% of transactions in 2021.

The percentage of sales from online shopping is taking bigger chunks of the United Kingdom's total retail sales. Data from the beginning of the year, particularly in January 2021, showed that internet shopping accounted for 36.3% of total retail sales in the country.

During the pandemic, British consumers turned to e-commerce to meet their needs. This is reflected in the most recent UK online grocery sales figures for 2021. By the end of January 2021, the country had seen a staggering 121% increase in online grocery sales. This equates to GBP 1.4 billion in sales in just one month, with new online shoppers accounting for GBP 770 million of that total.

It is estimated that the UK e-commerce industry will register a compound annual growth rate of 5.16%. The industry is expected to be worth GBP 113 billion, and the user penetration rate is likely to be around 90% by 2025.

Increase in Volume of Parcel Shipments

COVID-19 began to impact the United Kingdom's domestic parcel volumes in the early months of 2020. However, the more significant implications for the postal sector and consumers became apparent in Q1 of 2020-21.

The temporary closures of retail outlets led to a sharp rise in online shopping, driving increased demand for parcel delivery services. This sustained into the second half of 2020, and some parcel operators are expanding their delivery networks and creating new jobs in response.

The pandemic has also highlighted the importance of the postal sector in providing key services to consumers, such as government, NHS, and bank communications, and the delivery and collection of COVID-19 testing kits.

Since 2015, the volume of parcel shipments (including B2B, B2C, C2B, and consumer consigned shipments) saw annual growth of more than 1.5 billion in the United Kingdom. In 2020-21, the annual volume of parcel shipments amounted to 4.17 billion, and this was an increase of over 1.3 billion parcels relative to the previous year.

UK CEP Market Competitor Analysis

The UK courier, express, and parcel (CEP) market is relatively consolidated, with some companies occupying a major share of the market. With the growing demand for CEP services in the country, the companies are becoming more competitive to capture the huge opportunity. The local companies are facing high competition from multinational companies that have a comparatively well-developed infrastructure.

Additional Benefits:

The market estimate (ME) sheet in Excel format

3 months of analyst support

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