

Germany 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 German domestic courier, express, and parcel (CEP) market is expected to register a CAGR of 8% during the forecast period.

The German courier, express, and parcel (CEP) market soared to new records during the peak COVID-19 period in 2020, including a near-20% rise in B2C deliveries, as the pandemic accelerated underlying growth trends. It can be assumed that many consumers who placed more orders on the Internet during the lockdown will continue to do so after the pandemic. Parcel, express, and courier firms in Germany took on as many as 10,600 additional workers to cope with the rapid volume surge during 2020 as consumers went online to buy everyday goods amid pandemic lockdowns and widespread shop closures.

This market growth was driven by B2C deliveries, which soared by 19.7% in 2020. B2C shipments now account for 56% of all CEP volumes in Germany. The bulk of the B2C growth was in the domestic parcel market.

Consumer parcel volumes increased by 18.6%, while B2B shipments slumped due to shop closures and the pandemic's overall impact on businesses in diverse sectors. Due to the growing e-commerce market, the parcel delivery industry is reporting a record turnover in Germany. Because of the developing e-commerce in Germany, the number of courier parcels is growing every year.

Germany Courier Express & Parcel Market Trends

E-commerce is Driving the CEP Market Growth

In 2020, e-commerce in Germany was worth USD 91.8 billion, a 14.6% increase over the previous year. In 2021, the growth rate was 19%, which was significantly higher. When digital services are factored in, the total value of e-commerce accelerated to USD

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118 billion.

In 2021, mobile devices accounted for nearly 40% of all e-commerce sales, with mobile e-commerce sales increasing by 56.5% to USD 43.9 billion. Sales generated by mobile devices reached USD 30.9 billion in 2020, accounting for one-third of all e-commerce sales.

This reveals that m-commerce is becoming more popular among German consumers. Two out of every three 14 to 29-year-olds bought their products on a smartphone or tablet. Search engines and online stores continue to be the most important information sources for making a purchase decision, but they are followed by social media and apps.

Direct sales (D2C) from manufacturers increased the most in the third quarter of 2021. In 2021, multichannel retailers saw a 16.7% increase in sales. Their expansion was not as rapid as that of pure internet players, which reached 18.4%.

Bevh, an e-commerce association, predicts that digital traders will increase their sales even more in 2022. The organization anticipates that sales of goods will increase by 12% in 2022, resulting in gross sales of more than USD 121 billion.

Growth in Parcel Volumes Fueling the Market Growth

The pandemic in 2020 marked a year of standstill in Germany. Consumers and companies suffered from restrictions in their usual routines, but one sector that kept the operations running was parcel and courier services. It processed hundreds of millions of orders that came on top of its usual workload.

In the German courier, express, and parcel delivery sectors, including B2B, B2C, and C2C shipments, the development of total shipping volumes has been on a constant upward trend for years. According to industry sources, shipping volumes passed the 4 billion mark in 2021.

One of the main factors strengthening the German parcel market is the presence of numerous small and medium-sized businesses. In Germany, in 2021, over 12,000 companies were active in the CEP market, with the federal state of North Rhine-Westphalia having the highest concentration of firms.

As the economy is currently back to an upward trend in general, the expectations for the courier, express, and parcel business for the future are yet again positive. If the trend continues as expected, taking into account a further increase in e-commerce and considering estimates of German economic research institutes and relevant companies, a total of 5.7 billion shipments will be delivered in 2025. The main driver for shipment volume growth, the B2C parcel sector is likely to grow in relevance.

Germany Courier Express & Parcel Market Competitor Analysis

The domestic CEP market in Germany is moderately fragmented. Domestic deliveries are dominated by companies like DPD, General Logistics Systems, Mondo Logistics, etc. Apart from the established companies gaining significant market shares, companies like DHL and Hermes, which are German companies, have a strong market presence in the country apart from having an international presence. The delivery and third-party parcel companies are investing in technology to gain an edge and scale up their services in the country. With the pandemic taking place, the volume of online deliveries has increased significantly, and the delivery companies are trying to capitalize on this opportunity.

Additional Benefits:

The market estimate (ME) sheet in Excel format

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