

France Courier, Express, and Parcel (CEP) - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)

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Report description:

The France Courier, Express, and Parcel (CEP) Market size is estimated at 18.72 billion USD in 2025, and is expected to reach 22.77 billion USD by 2030, growing at a CAGR of 4.00% during the forecast period (2025-2030).

Infrastructure, e-commerce, and investments are driving the CEP market's growth

- The presence of a significant number of pick-up and drop-off points for couriers and parcels played a major role in facilitating efficient CEP deliveries in France. Some of the largest CEP delivery providers have the most number of pick-up and drop-off points in the country. For instance, La Poste Group, the national courier service, had the highest number of pick-up and drop-off points (24,000) as of 2022, followed by Mondial Relay and General Logistics Systems (GLS) with 11,000 points combined. The number of CEP pick-up and drop-off points is further expected to go up, with e-commerce reaching about USD 107 billion by 2027 in France, owing to growth in e-commerce, which is a major CEP demand driver.
- French customers are also more likely to make more online purchases in comparison to an average European customer, thus further facilitating the growth of the domestic and international CEP market. For instance, the number of e-commerce users in France is expected to reach 51.5 million by 2025. E-commerce sales for the fashion industry are expected to account for one-third of the total apparel sales in France by 2025, making it one of the largest e-commerce markets in France. This projected growth for e-commerce users and the fashion segment is expected to largely increase the demand for domestic and international CEP deliveries in France.

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

France is boosting its logistics industry with USD 1.06 billion investments toward road modernization and USD 106 billion towards rail infrastructure

- In 2023, France unveiled a USD 106.74 billion investment strategy slated for completion by 2040, aligning with its commitment to slash carbon emissions. The initiative, spearheaded by the government, focuses on bolstering and modernizing the nation's rail infrastructure. Central to the plan is the introduction of high-speed commuter trains, mirroring Paris's renowned RER system, in key urban centers. Collaborating on this endeavor are France's national rail entity, SNCF, alongside the European Union and regional administrations.
- In July 2024, Solaris secured an order from Artois Mobilites, part of the TADAO transport network in northern France, for four 12-meter Urbino hydrogen buses. These buses, slated for delivery in early 2025, will bolster Artois Mobilites' efforts to reduce carbon emissions, particularly in the Lens and Bethune regions. The Solaris Urbino 12 hydrogen buses will boast 70 kW fuel cells on their roofs and will be complemented by Solaris High Power traction batteries, providing additional support during peak electricity demand.

Increase in Russian LNG deliveries to France catering to fuel shortages caused by Russia-Ukraine war

- For the week ending July 12, 2024, diesel and super unleaded motor fuel prices in France saw a modest uptick. Diesel was priced at USD 1.84 per liter, inclusive of all taxes. In the first three months of 2024, Russian LNG deliveries to France increased more than to any other EU country compared to 2023. Paris has paid over USD 640.49 million to Russia for gas supplies since the start of 2024, prompting calls for France to reduce its purchases. This growing gas trade with Russia occurs as Macron aims to take a tougher stance in support of Kyiv, two years after Russia's full-scale invasion of Ukraine.
- In 2027, the EU is set to implement a new carbon pricing scheme, the Emissions Trading System 2 (ETS2), targeting CO2 emissions from buildings and road transport. Initially agreed upon in 2023, EU legislators assured that the pricing would cap at USD 48.03 per tonne of CO2, translating to an estimated 10-cent surcharge on each liter of diesel or petrol.

France Courier, Express, and Parcel (CEP) Industry Overview

The France Courier, Express, and Parcel (CEP) Market is moderately consolidated, with the major five players in this market being DHL Group, FedEx, GEODIS, La Poste Group and Walden Group (sorted alphabetically).

Additional Benefits:

- The market estimate (ME) sheet in Excel format
- 3 months of analyst support

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