

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

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Report description:

The Germany Courier, Express, and Parcel (CEP) Market size is estimated at 29.45 billion USD in 2025, and is expected to reach 34.95 billion USD by 2030, growing at a CAGR of 3.49% during the forecast period (2025-2030).

Significant growth is expected in CEP markets owing to increasing demand, residue impact of Russia Ukraine war, and consumer shift to online shopping

- A total of 2,66,000 employees worked in CEP companies as of 2021. However, CEP companies in Germany hired about 20,000 additional workers during November- December 2022 to fulfill high demand during the Christmas season. Also, 10,000 vehicles were added to cater to increased delivery orders. Following a similar trend, it is estimated that the country would require an additional 50,000 workers by 2026 to cope with increasing growth and demand.
- The overall German parcel market witnessed growth in value and volume across domestic and international deliveries due to the demand shock witnessed from 2020 to 2022 due to the pandemic, the Ukraine-Russia War, and existing market trends and consumer shift toward e-commerce. The growth is influenced by partnerships in industry as well. For instance, in March 2023, DHL and Poste Italiane signed a strategic partnership in the Italian and international parcel markets. Under the partnership, Poste Italiane will deliver parcels from DHL eCommerce Solutions and DHL Parcel Germany shipped to Italy.

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Germany leads European logistics and transportation, with rising investment initiatives focused on Eco-friendly mode of transport

- In July 2024, the German government initiated a nationwide project to establish a fast-charging network tailored for heavy-duty vehicles. This initiative aligns with Berlin's ambitious goal to achieve a carbon-neutral transport sector by 2045. Despite a notable drop in greenhouse gas emissions in 2023, marking a 70-year low for Europe's largest economy, the transport segment has struggled to hit its environmental benchmarks. Germany is targeting that roughly one-third of its heavy road haulage will be electrically powered or utilize electrically produced fuels like synthetic methane or hydrogen by 2030.
- The German government intends to invest more in rail than roads to promote environmental protection, sustainability, and effective transportation. In 2022, Deutsche Bahn, the federal government, and the local and regional governments invested roughly EUR 13.6 billion (USD 14.51 billion) in rail infrastructure. Lower Saxony, Hamburg, Bremen, Mecklenburg-Western Pomerania, and Schleswig-Holstein, together with DB, invested in modernizing their rail networks by 2030.

E5 gasoline prices in Germany dropped sharply due to end of maintenance season in Europe

- At the end of May 2024, E5 gasoline prices dropped significantly compared to April, with prices USD 4.91/100L lower in the last week. This decline is due to the end of the maintenance season in Europe, leading to increased refinery production and rising imports. Gasoline imports from Amsterdam-Rotterdam-Antwerp to Germany have steadily risen, with German seaports receiving 8,500 b/d in May, while exports fell to 3,700 b/d. The oversupply and end of maintenance season are driving down E5 gasoline prices in Germany. Meanwhile, diesel prices in the south and east are causing market disruptions.
- German consumers faced the fastest price rise, and the high annual inflation rate was primarily driven by extreme price increases for energy and groceries since the Russia-Ukraine War. Germany is among the world's biggest natural gas importers. Around 95% of its gas consumption is met by imports. In 2022, 55% of gas imports came from Russia, 30% from Norway, and 13% from the Netherlands. Moreover, Germany anticipates a fuel price jump from 2027 EU emissions trading. An increase of 38 cents per liter of petrol and around 3 cents per kilowatt hour of natural gas at the beginning of 2027 compared to 2026.

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

The Germany Courier, Express, and Parcel (CEP) Market is fairly consolidated, with the major five players in this market being DHL Group, International Distributions Services (including GLS), La Poste Group, Otto Group (including The Hermes Group) and United Parcel Service of America, Inc. (UPS) (sorted alphabetically).

Additional Benefits:

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

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